

Maximizing California Consumer Commitment To Beverage Container Recycling

PRE-WAVE FINAL REPORT

Prepared for: Dana Foran/ Department of Conservation, State of California

LIEBERMAN RESEARCH WORLDWIDE

1900 Avenue of the Stars

Los Angeles, CA 90067

Telephone: (310) 553-0550 Fax: (310) 553-4607

www.lrwonline.com

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Background and Objectives

This research is designed to track advertising awareness among California consumers for beverage container recycling messages, specifically examining the attitudes most related to positive intentions to recycle and the impact of CRV on recycling.

Research Objectives

Measure awareness of specific recycling methods and advertising of recycling messages

Measure of availability and usage of specific recycling methods at various locations (i.e., home, school or work, and recreational activities)

Measure key attitudes towards recycling, and that drive commitment to recycle

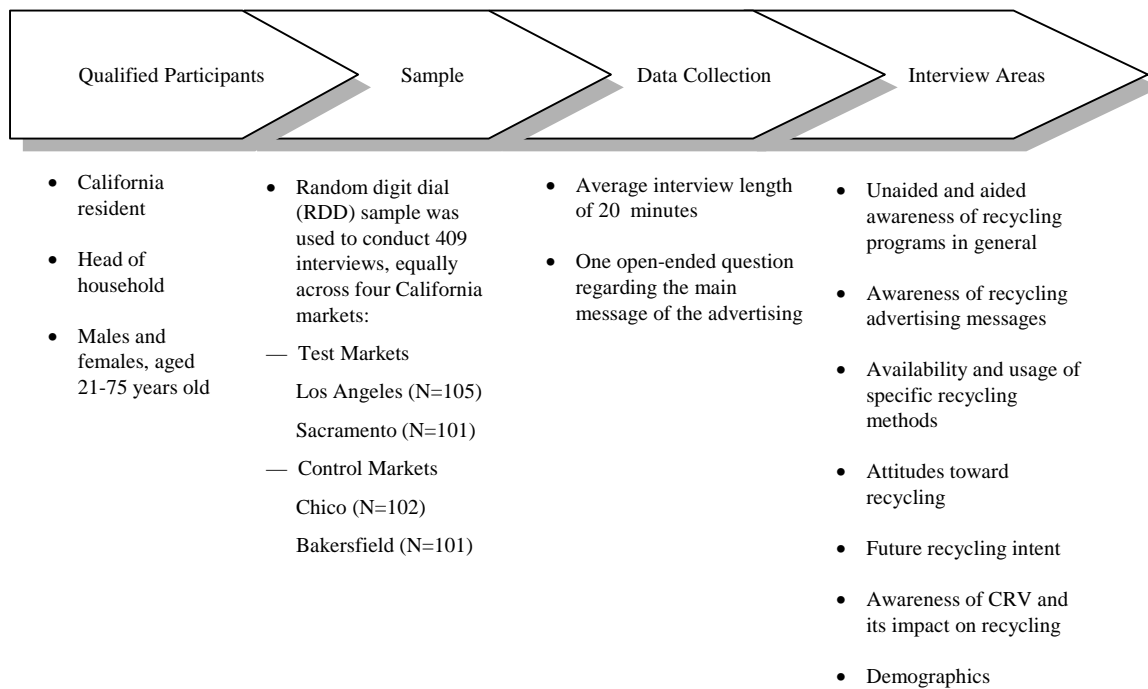
Understand consumers' awareness of 'CRV' and its impact on recycling

Marketing Objective

Track The
Impact Of The
Consumer Program
And Messages
In Support Of
Beverage
Container
Recycling

Method

A total of 409 computer-assisted telephone interviews (CATI) were conducted March 13-23, 2000 among California consumers to understand their recycling habits in general, and what drives them to recycle specifically. Interviews were conducted equally among test (Los Angeles and Sacramento) and control (Chico and Bakersfield) markets, and based on advertising spending.



Summary and Conclusions

While most consumers claim to do some recycling, they also claim to throw away their trash wherever convenient, suggesting that their recycling habits are not always consistent and may vary at times, depending on location (i.e., home, work or school, or during recreational activities), and time of year (i.e., summer). Consumers' future intent to recycle remains strong, as consumers will continue to recycle at their relatively low involvement levels. Factors considered when recycling involve environmental issues, although the redemption available is also valued among some consumers. While the advertising in the test markets does not impact awareness or usage levels, the main message of the campaign reflects the key drivers of recycling in general (i.e., it's good for the environment, etc.). Since these are already reasons for recycling among consumers, the advertising needs to focus on the specific methods available, as well as the specific bottles included in the CRV program to eliminate any confusion or lack of interest in the program.

- Overall awareness of recycling methods is strong, although only moderate on an unaided basis. Consumers in the test markets are somewhat more aware of curbside bins, since these areas have this recycling method readily available to them. Advertising awareness is also moderate, with the recent radio campaign having little effect on advertising awareness levels. The main message recalled from the advertising is generally related to environmental issues (i.e., keep environment clean, recycling helps the environment, etc.) rather than the redemption value available for redeeming beverage containers.
- Almost all consumers claim to recycle, although consumers also throw their beverage containers out with the regular trash or wherever convenient, suggesting that recycling habits are not consistent. However, consumers do recycle more at home and during recreational activities. There is little change in recycling during the year, although there are some consumers that do recycle more in the summer. Regardless of season, consumers are more likely to bring their beverage containers to commercial centers or use curbside bins more than any other methods available. Additionally, when traveling to recycle centers, consumers generally do not travel far (less than 3 miles on average), although some are willing to travel longer distances.
- Consumers place a strong importance on recycling in general, particularly for those consumers with stronger recycling awareness and usage levels -- consumers in the control markets and Caucasians. The key driving factors in influencing recycling are generally for environmental reasons, such as keeping the environment clean, preventing pollution, and saving natural resources. However, the redemption value available plays a role for consumers in the control markets, whereas time, space, and recycling center locations are factors for non-Hispanic minorities.
- Many consumers do not understand the correct meaning of CRV, although claim to have seen the label on beverage containers, as well as in advertising, store shelves, and cash receipts. The redemption value available to consumers has little impact on increasing general recycling habits, which may be a reflection of consumers' lack of awareness or misunderstanding of the CRV label. Additionally, consumers do understand that glass, aluminum, and plastic bottles are redeemable, although do not completely understand which specific bottles are included in the CRV program, presumably also contributing to their confusion or lack of interest in the program.

Chapter One: Awareness Of Recycling Methods And Advertising

Awareness of recycling programs is only moderate on an unaided basis. The most well-known methods are bringing containers to a commercial recycling center and curbside recycling (mentioned by 50% and 42%, respectively), followed by returning containers to a staffed lot, which places a distant third. Awareness of all programs is much higher on a combined unaided and aided basis. Additionally, Caucasians have a higher awareness of recycling methods than do other ethnic groups.

- Awareness of the various recycling programs is fairly similar between the test and control markets. Respondents in the control markets exhibit slightly higher awareness of recycling at commercial centers and drop-off bins, as well as giving containers to charity. Control market residents are actually less aware of curbside recycling, though this is likely due to the fact that curbside recycling is not available in all areas of the control market communities.

The recent radio campaign in the test markets had no impact on overall awareness of beverage recycling advertising. Past year advertising awareness is identical between the two markets (55%), as is respondents recall of the main message from the advertising.

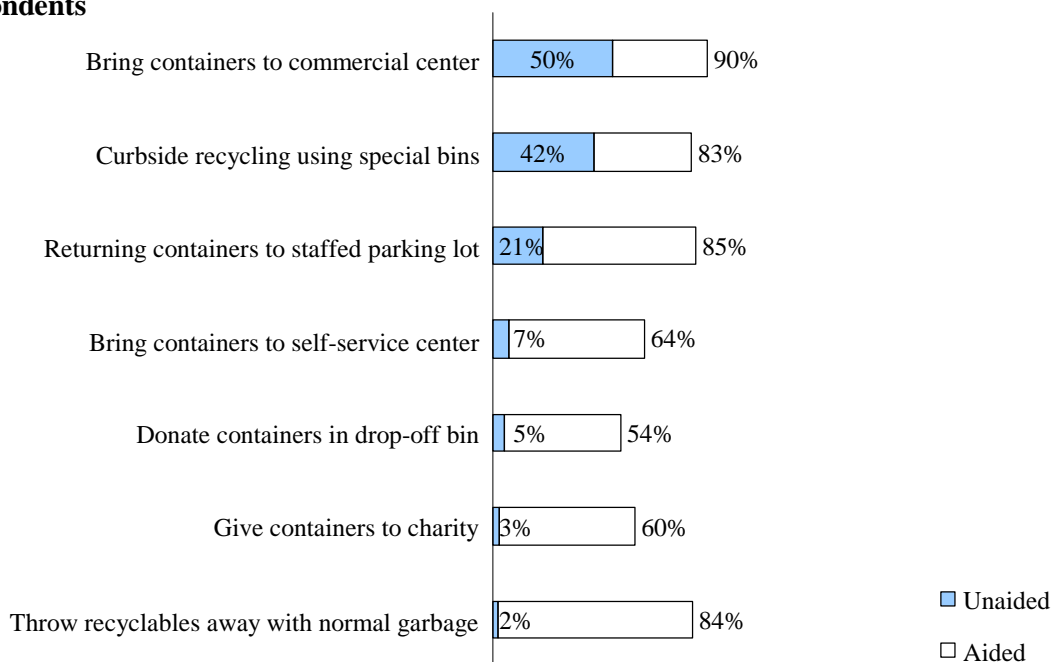
Awareness of Beverage Recycling Programs

On an unaided basis, consumers are only aware of three methods of recycling. Bringing containers to a commercial center and curbside recycling in special bins are the most well-known methods, followed by returning containers to a staffed parking lot, which places a distant third.

Total awareness (unaided and aided combined) of all programs is much higher. More than eight respondents in ten are aware of the three programs mentioned above, while an equal number also recall that recyclables can be thrown away with the normal garbage. The majority of respondents are also aware on an aided basis that containers can be brought to a self-service center or drop-off bin, or given to charity (unaided awareness of these methods is negligible, however).

RECYCLING PROGRAM AWARENESS

Among Total Respondents



Question 1a: (unaided) What are the ways that beverage containers can be recycled that you are aware of?

Question 1b: (aided) Have you ever heard of...? (READ ALL WAYS NOT MENTIONED IN Q1a)

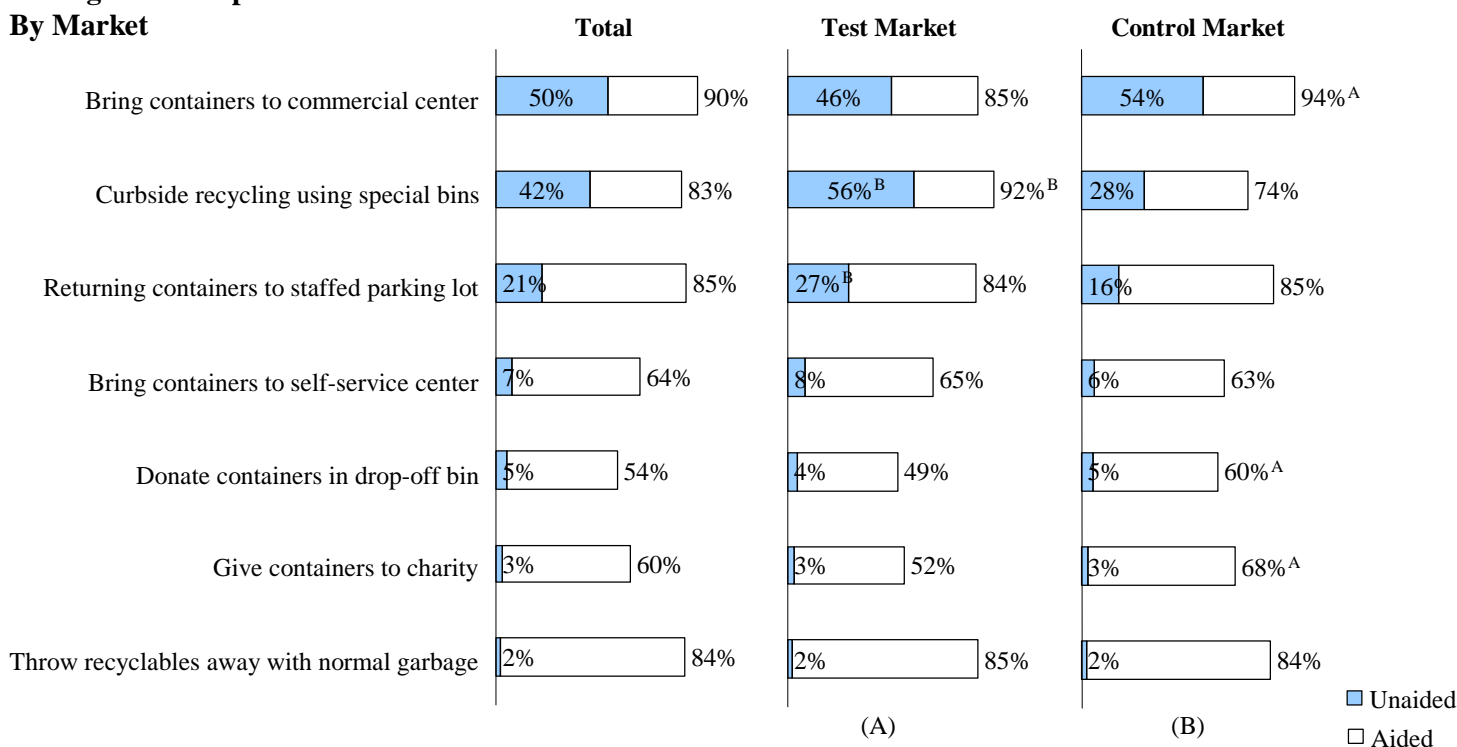
Awareness of Beverage Recycling Programs

Awareness of various recycling programs is fairly similar between the test and control markets. Respondents in the control markets exhibit slightly higher awareness of recycling at commercial centers, drop-off bins and giving containers to charity. Control market residents are actually less aware of curbside recycling programs, though this is likely due to the fact that curbside recycling is not available in all areas of the control market communities.

RECYCLING PROGRAM AWARENESS

Among Total Respondents

By Market



Question 1a: (unaided) What are the ways that beverage containers can be recycled that you are aware of?

Question 1b: (aided) Have you ever heard of...? (READ ALL WAYS NOT MENTIONED IN Q1a)

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90% confidence level.

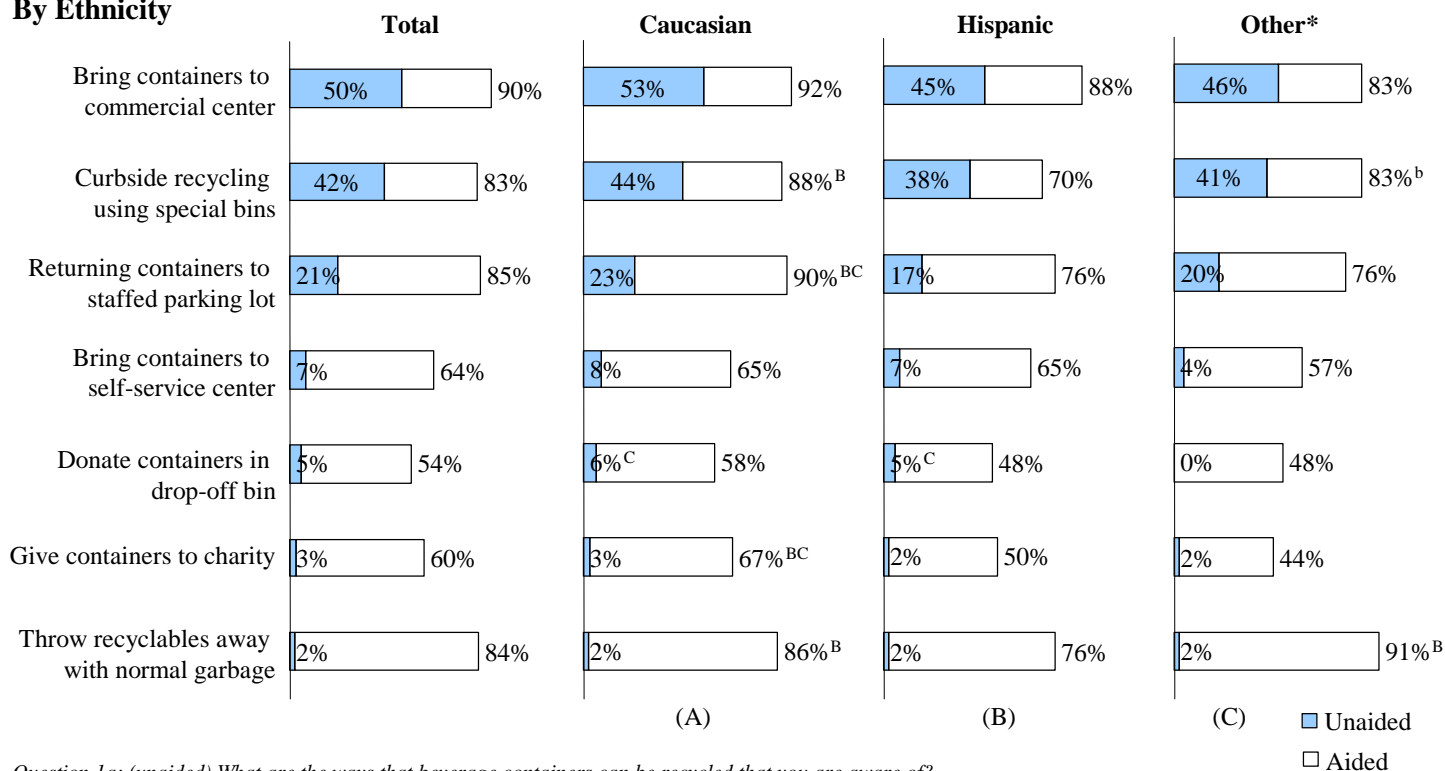
Awareness of Beverage Recycling Programs

Caucasians have higher overall awareness levels of various recycling programs relative to other ethnic groups.

RECYCLING PROGRAM AWARENESS

Among Total Respondents

By Ethnicity



Question 1a: (unaided) What are the ways that beverage containers can be recycled that you are aware of?

Question 1b: (aided) Have you ever heard of...? (READ ALL WAYS NOT MENTIONED IN Q1a)

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian, and American Indian.

Awareness of Beverage Recycling Advertising

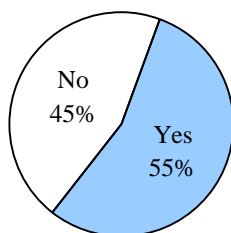
The recent radio campaign in the test markets had no impact on overall awareness of beverage recycling advertising. Past year beverage recycling advertising awareness is identical between the two markets, as is respondents' recall of the main advertising message. The main message recalled from the advertising is more about environmental issues in general, rather than recycling or cash back rewards.

ADVERTISING AWARENESS

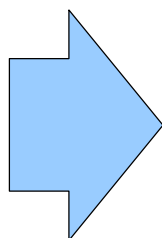
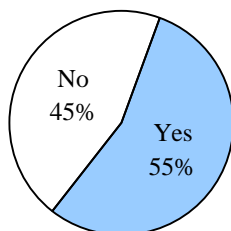
By Market

Main Message of Advertising

Test Market



Control Market



	Total (225)	Test (113)	Control (112)
<u>Environmental (Net)</u>	<u>59%</u>	<u>58%</u>	<u>59%</u>
Keep environment clean	12	11	14
Help/save/protect environment	12	12	13
Don't pollute the environment	8	10	7
Recycling is good/helps environment	8	10	7
Conserve/preserve	6	10 ^B	3
Landfills are filling	5	4	7
Recycling cleans up the environment	4	2	6 ^a
<u>Recycling (Net)</u>	<u>44%</u>	<u>46%</u>	<u>41%</u>
Everyone should recycle	21	25	28
Recycling is good/ helps environment	8	10	7
Showed how to recycle	4	4	3
Recycling cleans up the environment	4	2	6 ^a
Reduce, reuse and recycle	4	1	6 ^A
<u>Cash back rewards (Net)</u>	<u>8%</u>	<u>8%</u>	<u>9%</u>
Can get money back	4	5	3
Told the amount of money back for recycling	3	2	4
		(A)	(B)

Question 12a: In the past year, have you seen or heard any advertising about recycling beverage bottle or containers?

Question 12b: What was the main message that the advertising was trying to communicate?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

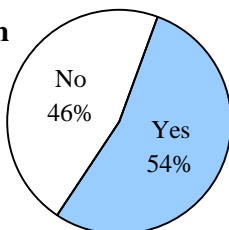
Awareness of Beverage Recycling Advertising

Beverage recycling advertising awareness is at the same level across ethnic groups. Caucasians and Hispanics recall a more general environmental message to the advertising, and less a specific recycling message than do other ethnic groups, however.

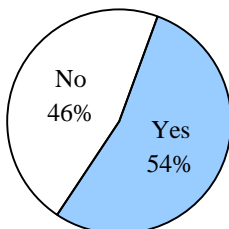
ADVERTISING AWARENESS

By Ethnicity

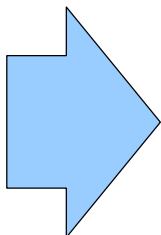
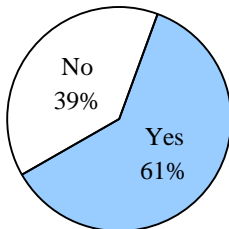
Caucasian



Hispanic



Other*



Main Message of Advertising

	Total (N=225)	Caucasian (N=140)	Hispanic (N=52)	Other* (N=33) [†]
<u>Environmental (Net)</u>	<u>59%</u>	<u>59%^c</u>	<u>67%^c</u>	<u>42%</u>
Keep environment clean	12	16 ^c	12 ^c	-
Help/save/protect environment	12	11	21 ^{aC}	6
Don't pollute the environment	8	5	13 ^a	15
Recycling is good/helps environment	8	9	6	9
Conserve/preserve	6	8	4	3
Landfills are filling	5	7 ^b	2	3
Recycling cleans up the environment	4	4	6	3
<u>Recycling (Net)</u>	<u>44%</u>	<u>45%</u>	<u>35%</u>	<u>52%^{aB}</u>
Everyone should recycle	21	20	15	36 ^{aB}
Recycling is good/helps environment	8	9	6	9
Showed how to recycle	4	5 ^B	-	3
Recycling cleans up the environment	4	4	6	3
Reduce, reuse and recycle	4	4	2	3
<u>Cash back rewards (Net)</u>	<u>8%</u>	<u>7%</u>	<u>13%</u>	<u>6%</u>
Can get money back	4	4 ^C	6 ^C	-
Told the amount of money back for recycling	3	2	4	3
		(A)	(B)	(C)

Question 12a: In the past year, have you seen or heard any advertising about recycling beverage bottle or containers?

Question 12b: What was the main message that the advertising was trying to communicate?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian and American Indian.

[†]Caution: small base.

Chapter Two: Usage Of Recycling Methods

Although almost all consumers claim to recycle, consumers have low involvement in their overall recycling habits. Few consumers claimed unaided awareness of specific methods available to them, and partake in the methods even less frequently. Most consumers either take their beverage containers to commercial centers or have curbside bins. However, consumers also throw their containers away with their normal garbage or wherever convenient, suggesting that their recycling is not always consistent. When recycling, consumers recycle more at home and during recreational activities than at work, which may be a reflection of the control consumers have on their recycling when participating in these activities.

- Curbside recycling is more often used in the test markets, reflecting their overall higher awareness levels and availability of this recycling method. These consumers are also more likely to take their recycling to the nearest recycling bin or throw away their containers wherever convenient when involved in recreational activities. Conversely, those consumers in the control markets are more apt to bring their containers from recreational activities home to recycle, reflecting the method they utilize most often at home -- bringing containers to a commercial center. There is little difference by area when recycling at work, presumably because consumers have less control over their consumed containers at the office, although some take their containers home to recycle. While there are few ethnic differences in recycling patterns, non-Hispanic minorities are more likely to throw away their recyclables wherever convenient relative to Caucasians and Hispanics.
- Consumers that take their beverage containers elsewhere to be recycled are willing to travel long distances, although generally only travel approximately 3 miles to their nearest center. Consumers take their recycling to the commercial center both as their sole purpose as well as in conjunction with running other errands, such as the grocery store. Consumers in the control markets are somewhat more inclined to travel farther distances for their recyclables, as are Caucasians.
- Future intent to continue recycling is strong, particularly among the control market consumers and Caucasians, reflecting their stronger overall recycling habits in general. However, the amount of which they are recycling is inconsistent, as consumers also throw away their recyclables wherever convenient at times. There are some consumers that recycle more during the summer months, but there is generally no shift in recycling habits during the year. However, making more conveniently located bins available would enhance consumers' overall recycling behavior.

Demographic Composition

Consumers in the control markets recycle more, perhaps because they have lower household incomes and are more often unemployed. These consumers are also more female, older, and Caucasian than their counterparts.

SAMPLE COMPOSITION

	Total (N=409)	Test Market (N=206)	Control Market (N=203)
<u>Gender</u>			
Male	41%	46% ^B	36%
Female	59	54	64 ^A
<u>Age</u>			
21-34	27%	30%	24%
35-54	47	48	45
55+	26	22	31 ^a
Mean Age	44.6	43.0	46.2 ^A
<u>Ethnicity</u>			
Caucasian	63%	54%	73% ^A
Hispanic	24	27 ^b	20
Other	13	19	7
<u>Marital Status</u>			
Married	61%	58%	65%
Not-Married	39	42	35
<u>Household Size</u>			
Mean number of people	2.8	2.7	2.9
Mean number of children	0.8	0.8	0.9
Average Length of California Residency (in years)	11.7	11.8 (A)	11.6 (B)

Demographic Composition (Continued)

SAMPLE COMPOSITION

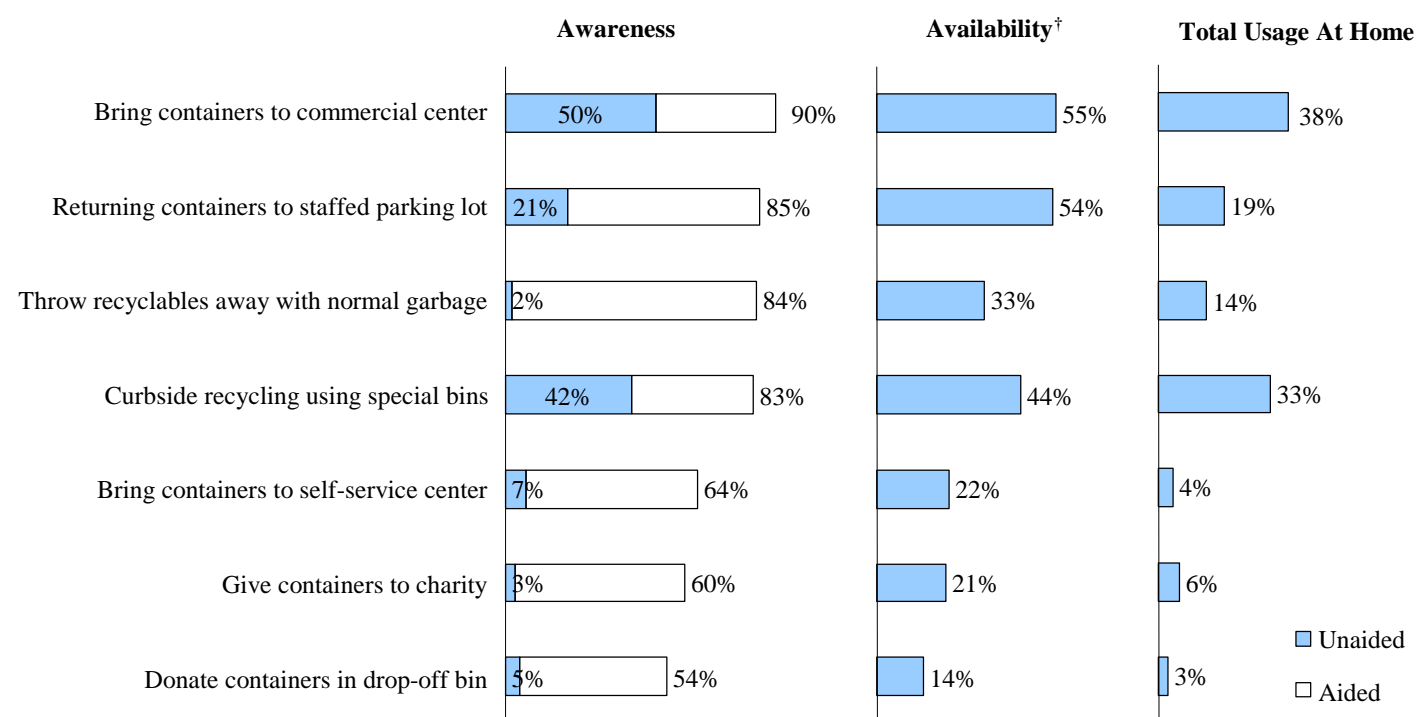
	Total (N=409)	Test Market (N=206)	Control Market (N=203)
<u>Ownership of Dwelling</u>			
Own	66%	60%	72% ^A
Rent	34	40 ^B	28
<u>Type of Dwelling</u>			
Home/duplex/townhouse	80%	73%	88% ^A
Apartment/condo/other	19	27 ^B	11
<u>Education</u>			
High school or less	34%	28%	41% ^A
Some college or more	66	72 ^B	59
<u>Employment</u>			
Employed	65%	70% ^B	60%
Not Employed	35	30	40 ^A
<u>Income</u>			
Less than \$40,000	51%	44%	57% ^A
\$40,000 or more	49	56 ^B	43
Average Household Income	\$41,400	\$45,000 ^B	\$38,000
<u>Recycling Habits</u>			
At home	94%	92%	96%
At work or school	85	83	87
At recreational activities	94	93	96
		(A)	(B)

Awareness and Availability of Beverage Recycling Programs

Although at lower levels, availability of individual recycling programs at home reflect overall awareness of these programs. Additionally, although virtually all consumers recycle, usage of specific methods is only moderate, with commercial centers and curbside bins being the most often used methods.

RECYCLING PROGRAM AWARENESS, AVAILABILITY AND USAGE

Among Total Respondents



Question 1a: (unaided) What are the ways that beverage containers can be recycled that you are aware of?

Question 1b: (aided) Have you ever heard of...? (READ ALL WAYS NOT MENTIONED IN Q1a)

Question 1c: What beverage container recycling programs or ways that beverage containers can be recycled are there available in your neighborhood or community?

Question 2a: Which programs or ways do you or anyone in your household currently use to recycle beverage containers when you are at home?

[†]Accessibility is based on respondent's knowledge of programs available in their neighborhood and may not reflect actual availability.

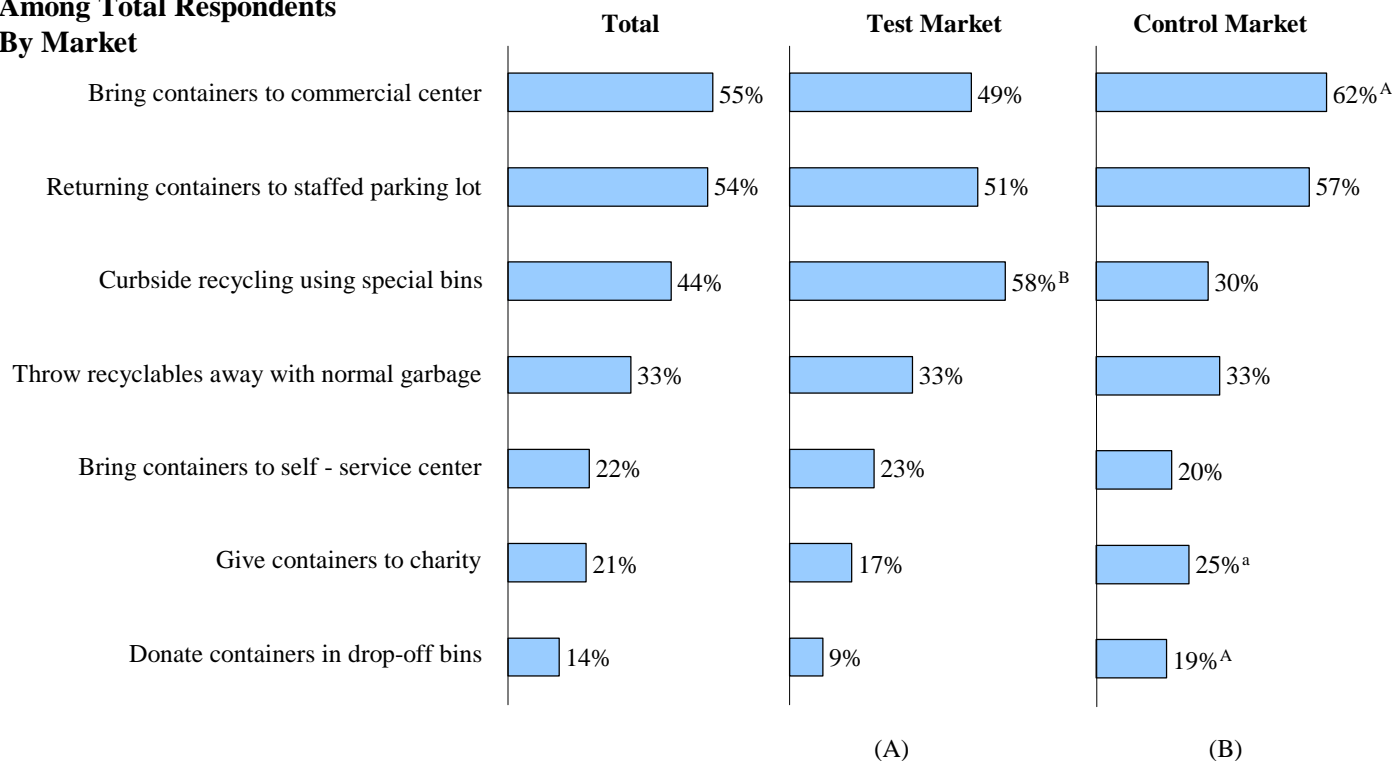
Availability of Beverage Recycling Programs

Californians in more metropolitan areas (Los Angeles and Sacramento) perceive having curbside recycling available to them more than any other program. While those in Chico and Bakersfield do not have curbside recycling as readily available to them as other methods, these consumers have more options available to them in general, particularly commercial centers and donation places.

RECYCLING PROGRAM AVAILABILITY[†]

Among Total Respondents

By Market



Question 1c: What beverage container recycling programs or ways that beverage containers can be recycled are there available in your neighborhood or community?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

[†]Accessibility is based on respondent's knowledge of programs available in their neighborhood and may not reflect actual availability.

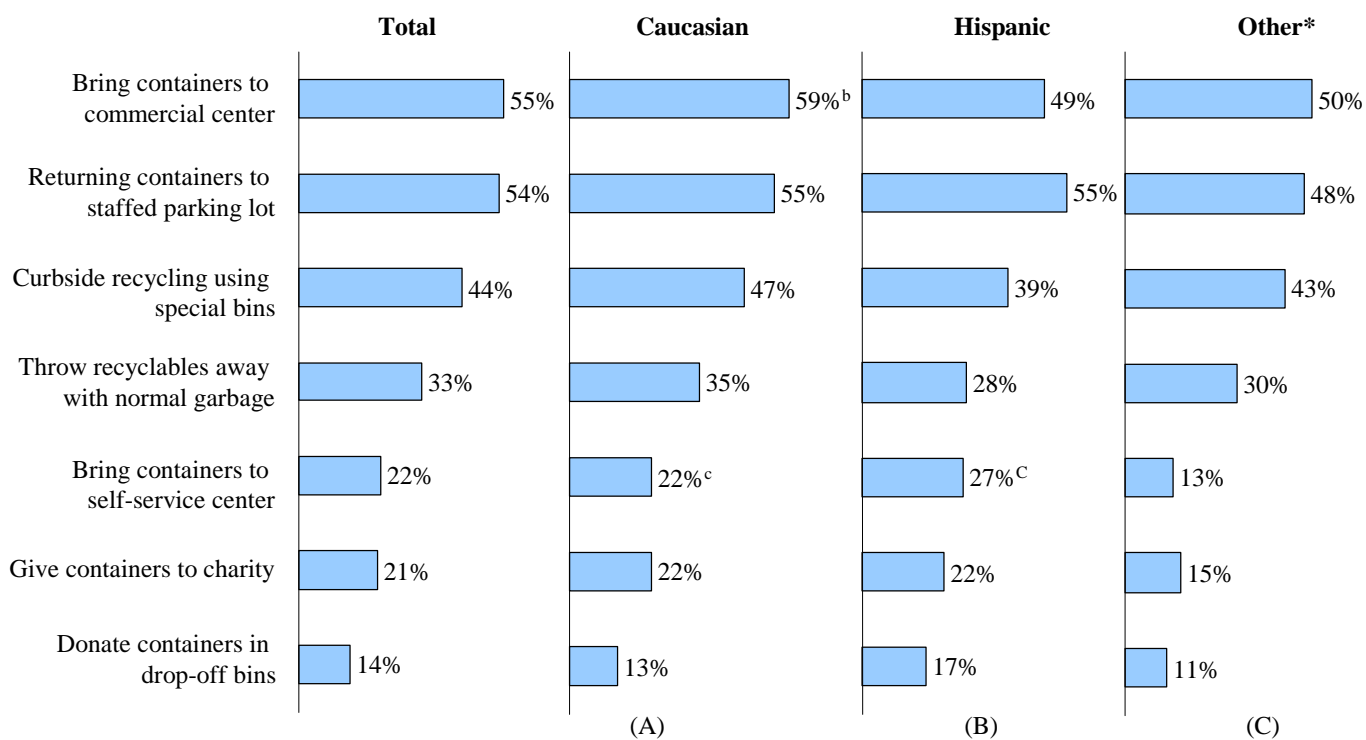
Availability of Beverage Recycling Programs

Caucasians generally claim more availability to various recycling methods relative to other ethnic groups.

RECYCLING PROGRAM AVAILABILITY[†]

Among Total Respondents

By Ethnicity



Question 1c: What beverage container recycling programs or ways that beverage containers can be recycled are there available in your neighborhood or community?

[†]Accessibility is based on respondent's knowledge of programs available in their neighborhood and may not reflect actual availability.

*"Other" includes: African-American, Asian, and American Indian.

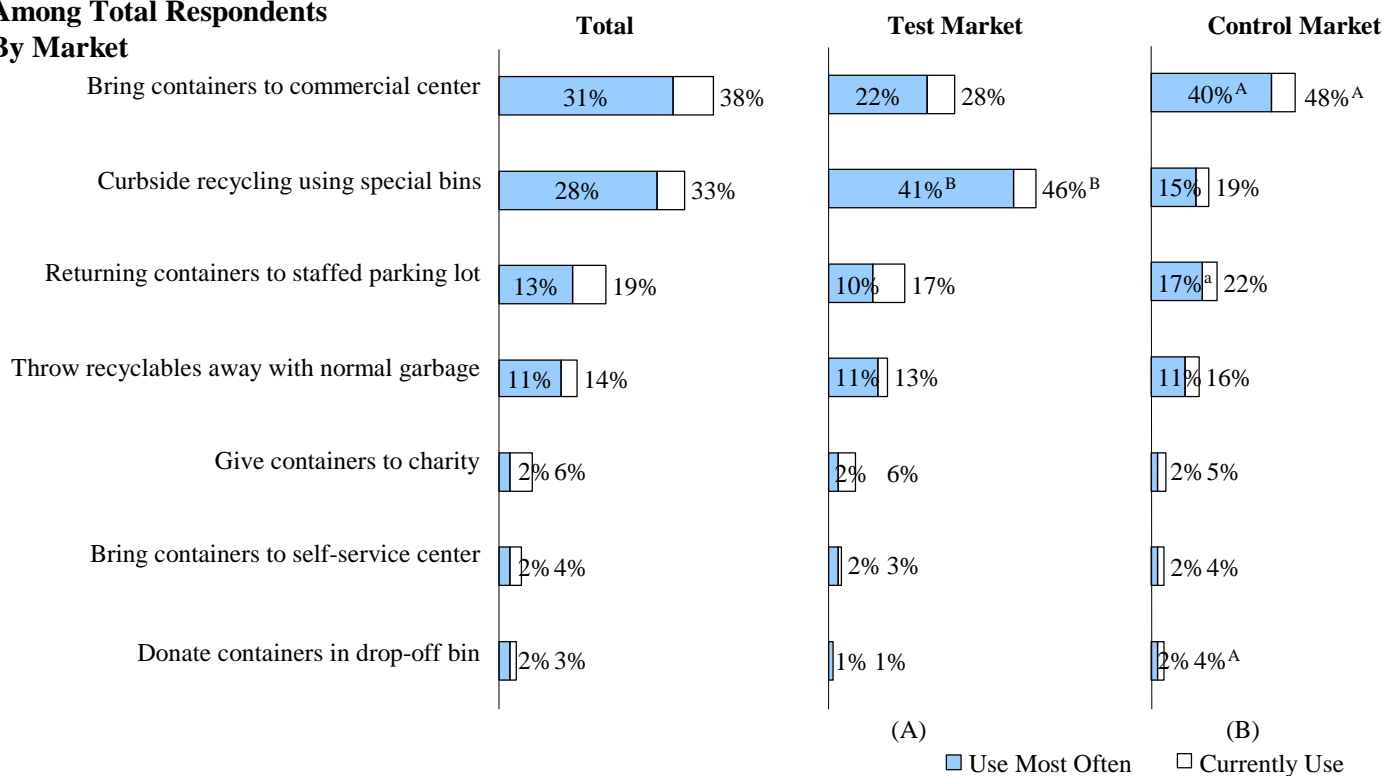
Recycling Usage

Consumers in the test markets are more apt to recycle at home using special curbside bins, whereas those consumers in the control markets are more likely to go to a commercial center. Additionally, the method consumers use most often reflects their overall home recycling habits, since few consumers use multiple recycling methods.

RECYCLING PROGRAM UTILIZED AT HOME

Among Total Respondents

By Market



Question 2a: I'd like you to think about beverage containers which may be recycled while you are at home. Which programs or ways do you or anyone in your household currently use to recycle beverage containers when you are at home?

Question 2b: And, which of these programs or ways do you or someone in your household use most often?

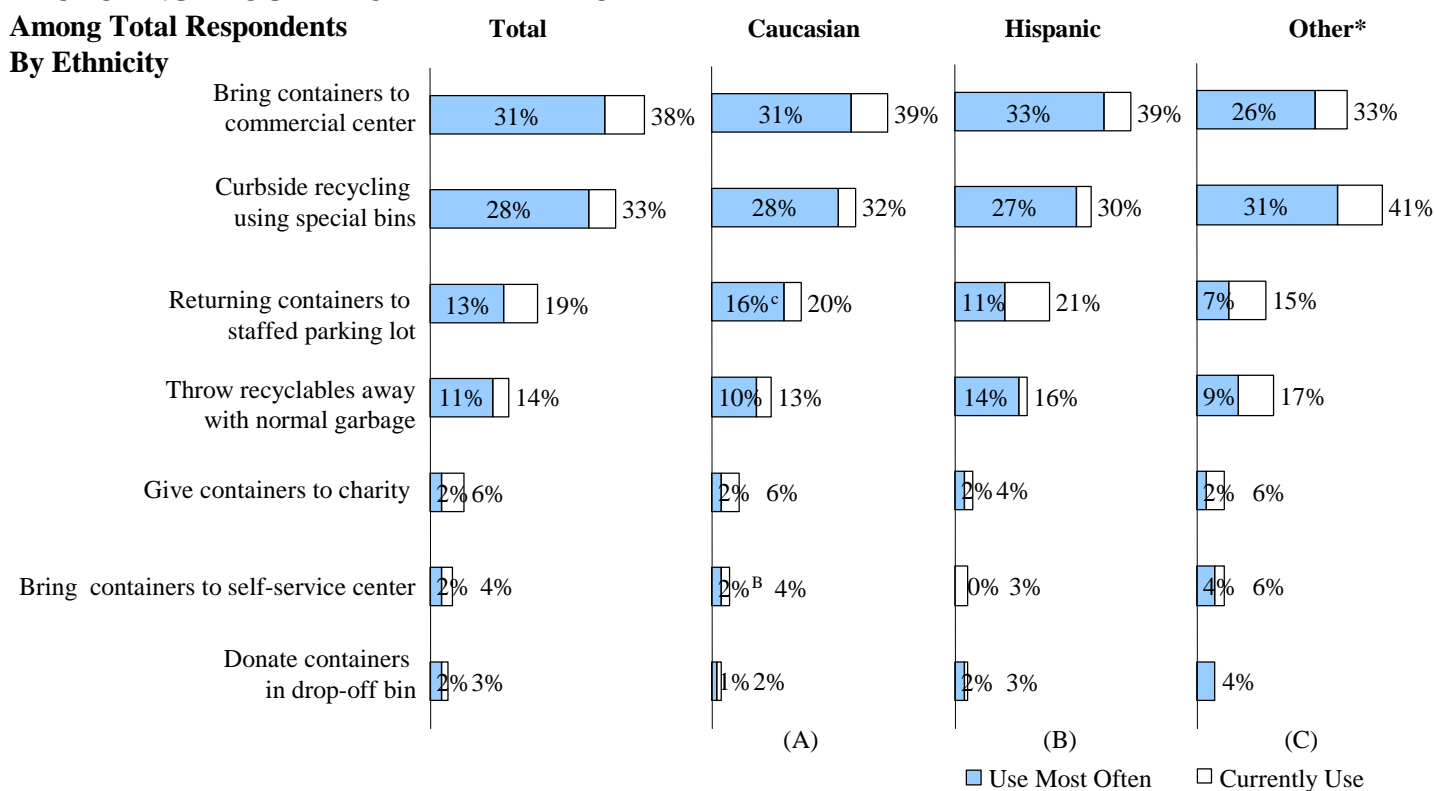
Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90% confidence level

Recycling Usage

There are no real significant differences by ethnicity for home recycling methods. However, Caucasians return containers to staffed parking lots more often than other ethnic groups, while non-Hispanic minorities use curbside recycling more than going to commercial centers.

RECYCLING PROGRAM UTILIZED AT HOME

Among Total Respondents
By Ethnicity



Question 2a: I'd like you to think about beverage containers which may be recycled while you are at home. Which programs or ways do you or anyone in your household currently use to recycle beverage containers when you are at home?

Question 2b: And, which of these programs or ways do you or someone in your household use most often?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level

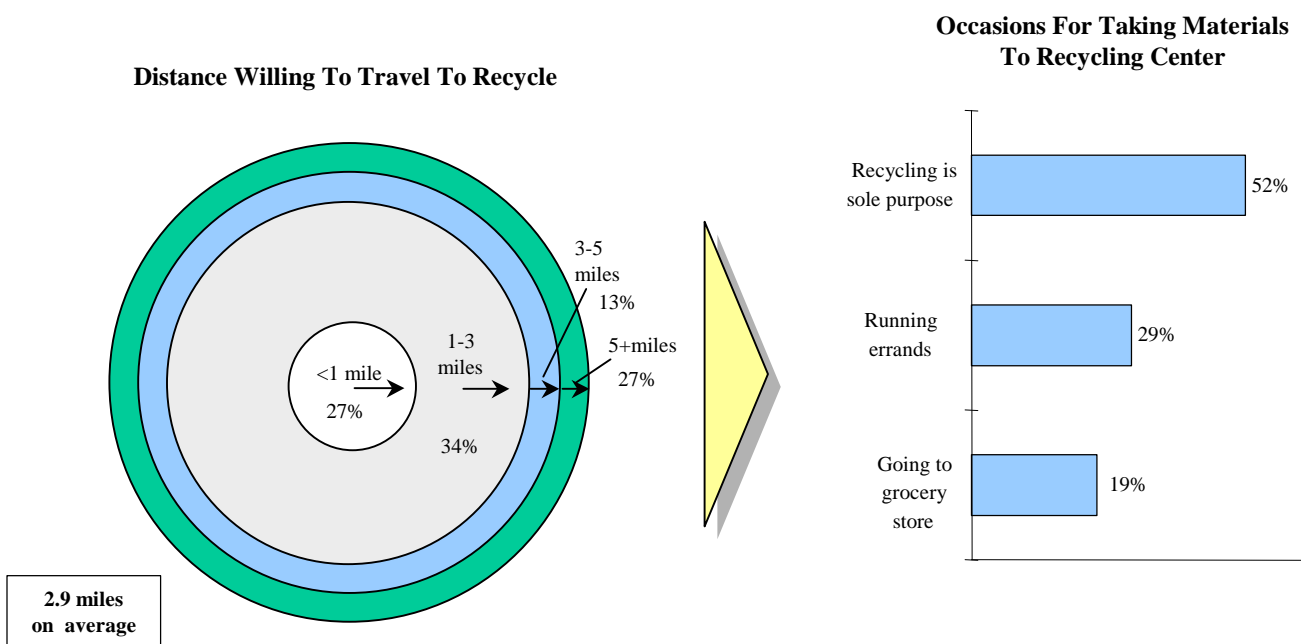
*"Other" includes: African American, Asian, and American Indian.

Distance Willing To Travel To Recycle Beverage Containers

On average, consumers are only willing to travel a short distance (2.9 miles) to recycle their beverage containers, although a quarter of consumers (27%) are also willing to travel longer distances -- more than 5 miles. When recycling away from home, half of consumers make recycling their destination location, as the trip was planned specifically for that purpose, while half also do their recycling along with other activities (i.e., running errands, going to the grocery store).

RECYCLING BEHAVIOR

Among Consumers Who Use Method Other Than Curbside Recycling



Question 2d: How far from your home do you travel to recycle your beverage containers? Do you travel...?

Question 2e: When you travel to recycling centers to recycle your beverage containers, is it?

Distance Willing To Travel To Recycle Beverage Containers

Consumers in suburban areas are more willing to drive longer distances for their recycling. This may be related to the location and number of recycling centers made available in these areas. Additionally, those consumers in larger cities split the recycling they do along with other activities equally between errands and the grocery store, while those in Chico and Bakersfield are more apt to go along with other errands more than when grocery shopping.

RECYCLING BEHAVIOR

Among Consumers Who Use Method Other Than Curbside Recycling

By Market

Distance Willing To Travel				Occasions For Taking Materials to Recycling Center			
	Total (N=244)	Test (N=99)	Control (N=145)		Total (N=244)	Test (N=99)	Control (N=145)
<u>Less than 3 miles</u>	<u>60%</u>	<u>67%</u> ^b	<u>56%</u>	Recycling is sole purpose	52%	51%	52%
Less than 1 mile	27	30	24				
More than 1 mile but less than 3 miles	34	36	32	Running errands	29%	24%	32%
<u>More than 3 miles</u>	<u>40</u>	<u>33</u>	<u>44</u> ^a				
More than 3 miles but less than 5 miles	13	8	16 ^a	Going to grocery store	19%	25% ^b	16%
5 miles or more	27	25	28			(A)	(B)
		(A)	(B)				

Question 2d: How far from your home do you recycle your beverage containers? Do you travel...?

Question 2e: When you travel to recycling centers to recycle your beverage containers, is it?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level 20

Distance Willing To Travel To Recycle Beverage Containers

Caucasians travel the farthest for their recycling, and recycle while they are running errands. Hispanics generally go to a recycling center as their sole purpose, but only have to travel a short distance to get there.

RECYCLING BEHAVIOR

Among Consumers Who Use Methods Other Than Curbside Recycling By Ethnicity

Distance Willing To Travel					Occasions For Taking Materials to Recycling Center				
	Total (N=244)	Caucasian (N=158)	Hispanic (N=58)	Other* (N=28) [†]		Total (N=244)	Caucasian (N=158)	Hispanic (N=58)	Other* (N=28) [†]
<u>Less than 3 miles</u>	<u>60%</u>	<u>55%</u>	<u>69%^a</u>	<u>70%</u>	Recycling is sole purpose	52%	49%	62% ^a	50%
Less than 1 mile	27	24	38 ^{ac}	19					
More than 1 mile but less than 3 miles	34	32	31	52 ^{ab}	Running errands	29	34 ^{BC}	18	18
<u>More than 3 miles</u>	<u>40</u>	<u>45^b</u>	<u>31</u>	<u>30</u>					
More than 3 miles but less than 5 miles	13	15 ^b	7	11	Going to grocery store	19	17	20	32
5 miles or more	27	29	24	19			(A)	(B)	(C)
		(A)	(B)	(C)					

Question 2d: How far from your home do you recycle your beverage containers? Do you travel...?

Question 2e: When you travel to recycling centers to recycle your beverage containers, is it?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*“Other” includes: African American, Asian, and American Indian.

[†]Caution: small base.

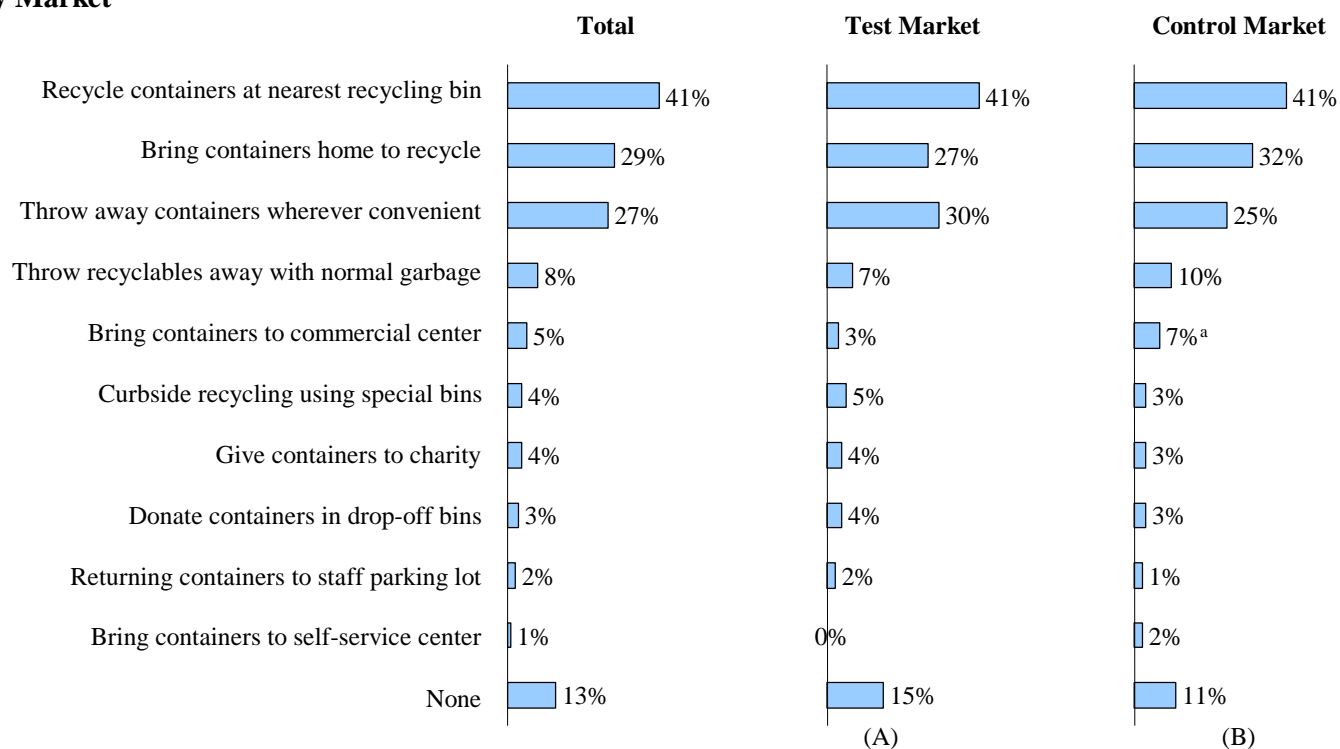
Recycling Usage

While consumers' recycling is universal in general, consumers in both the test and control markets recycle less often at work or school. However, when recycling at school or work, consumers mostly take their containers to the nearest recycling bin, as well as take them home, although a quarter of consumers throw away containers wherever convenient.

RECYCLING PROGRAMS UTILIZED WHILE AT WORK OR SCHOOL

Among Total Respondents

By Market



Question 3a: Which of the following programs or ways do you currently use to recycle beverage containers at work or school if any?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

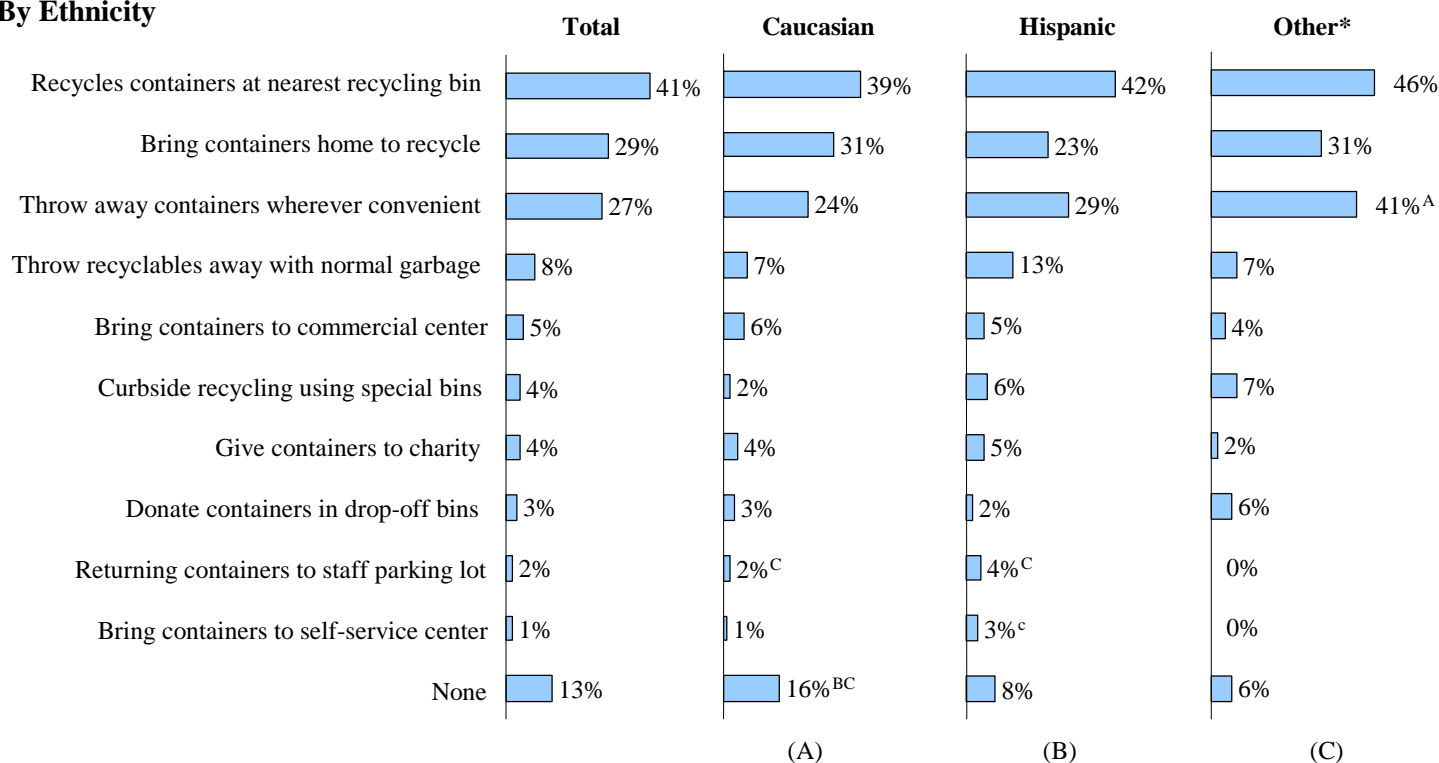
Recycling Usage

Non-Hispanic minorities are more prone to throwing away their containers wherever convenient when at work or school relative to Caucasians and Hispanics. However, regardless of ethnicity, the most often method utilized in recycling at work or school is taking their beverage containers to the nearest recycling bin.

RECYCLING PROGRAMS UTILIZED WHILE AT WORK OR SCHOOL

Among Total Respondents

By Ethnicity



Question 3a: Which of the following programs or ways do you currently use to recycle beverage containers at work or school if any?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level

*"Other" includes: African American, Asian, and American Indian.

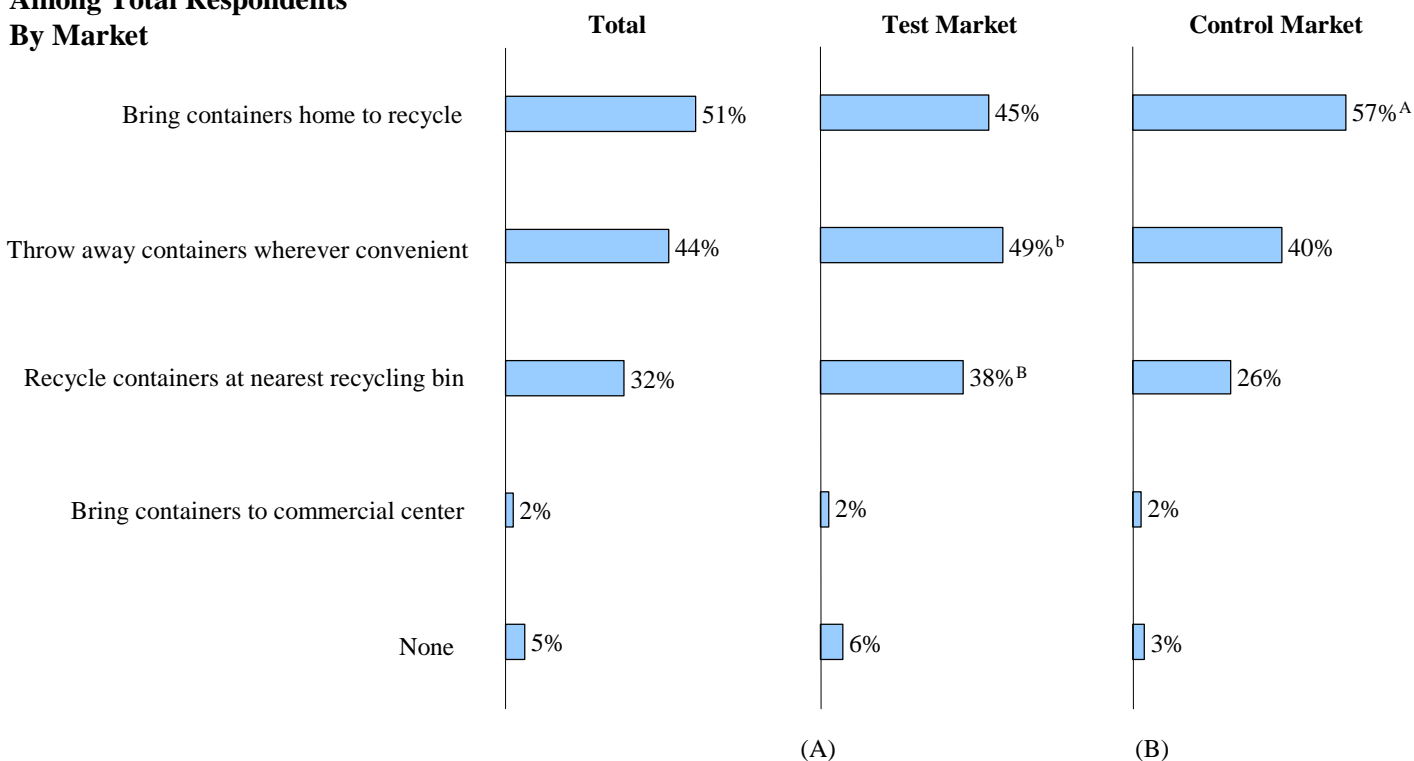
Recycling Usage

When involved in recreational activities, almost all consumers recycle, generally bringing their containers home to recycle, particularly those consumers in the control markets. This may be because these consumers are already taking their recycling to commercial centers. However, consumers also throw away their containers wherever convenient as well, while only a third of consumers take their recycling elsewhere (i.e., nearest recycling bin, commercial center).

RECYCLING PROGRAMS UTILIZED WHILE INVOLVED IN RECREATIONAL ACTIVITIES

Among Total Respondents

By Market



Question 3b: And, when you are outside of your home, involved in recreational activities, such as a road trip, picnic, camping, boating or a sporting event. Which programs or ways do you currently use to recycle beverage containers while you're away from home, involved in recreational activities, if any?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

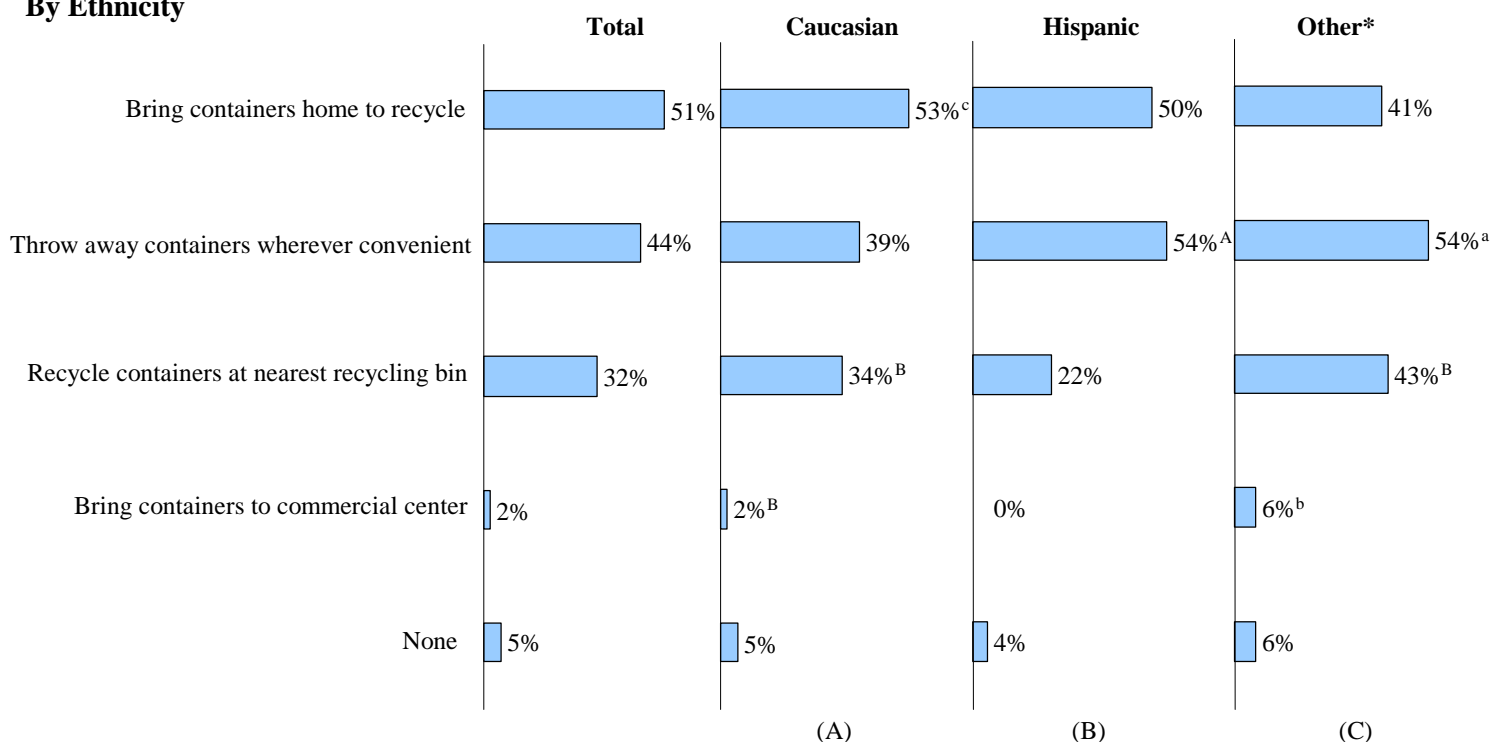
Recycling Usage

Caucasians are less likely to throw away their containers wherever convenient when involved in recreational activities, and more likely to bring their containers home to be recycled with the rest of their recyclables. While taking containers to the nearest recycling bin or commercial centers are not the methods most often used, Hispanics are more likely to use these means relative to other ethnic groups.

RECYCLING PROGRAMS UTILIZED WHILE INVOLVED IN RECREATIONAL ACTIVITIES

Among Total Respondents

By Ethnicity



Question 3b: And, when you are outside of your home, involved in recreational activities, such as a road trip, picnic, camping, boating or a sporting event. Which programs or ways do you currently use to recycle beverage containers while you're away from home, involved in recreational activities, if any?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian, and American Indian.

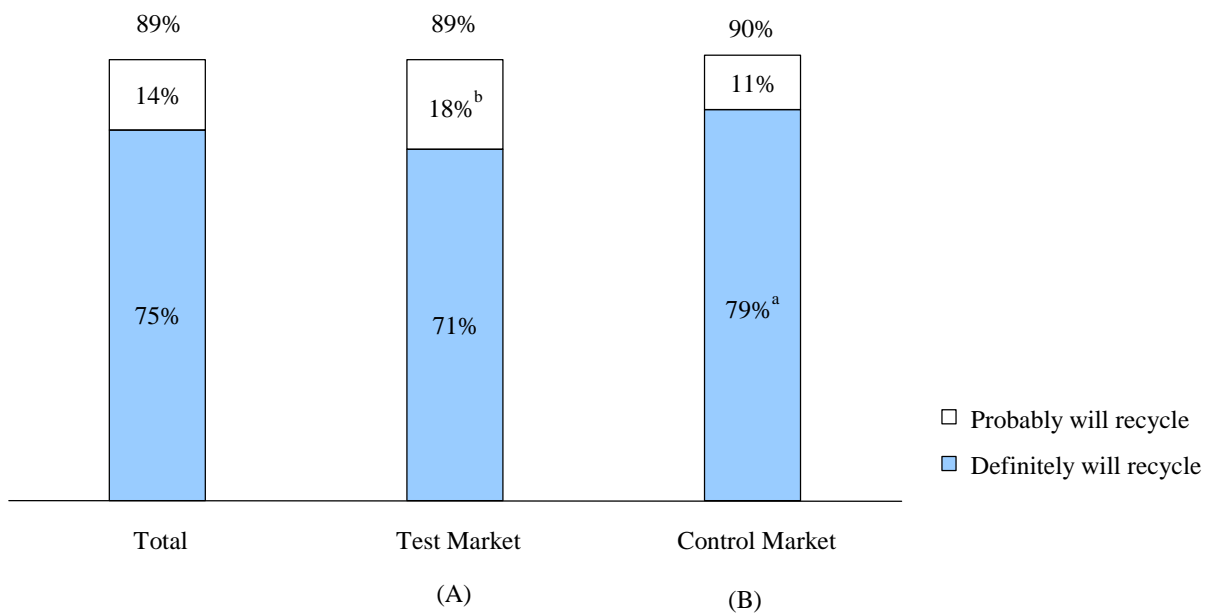
Recycling Behavior

Future intent to recycle is high, with most consumers continuing their current habits. Those in Chico and Bakersfield are somewhat more committed ("definitely will recycle") to their recycling, reflecting their stronger recycling levels in general.

FUTURE INTENT TO RECYCLE

Among Total Respondents

By Market



Question 10 and 11: How likely is it that your household will recycle/will continue to recycle beverage bottle and containers in the future?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

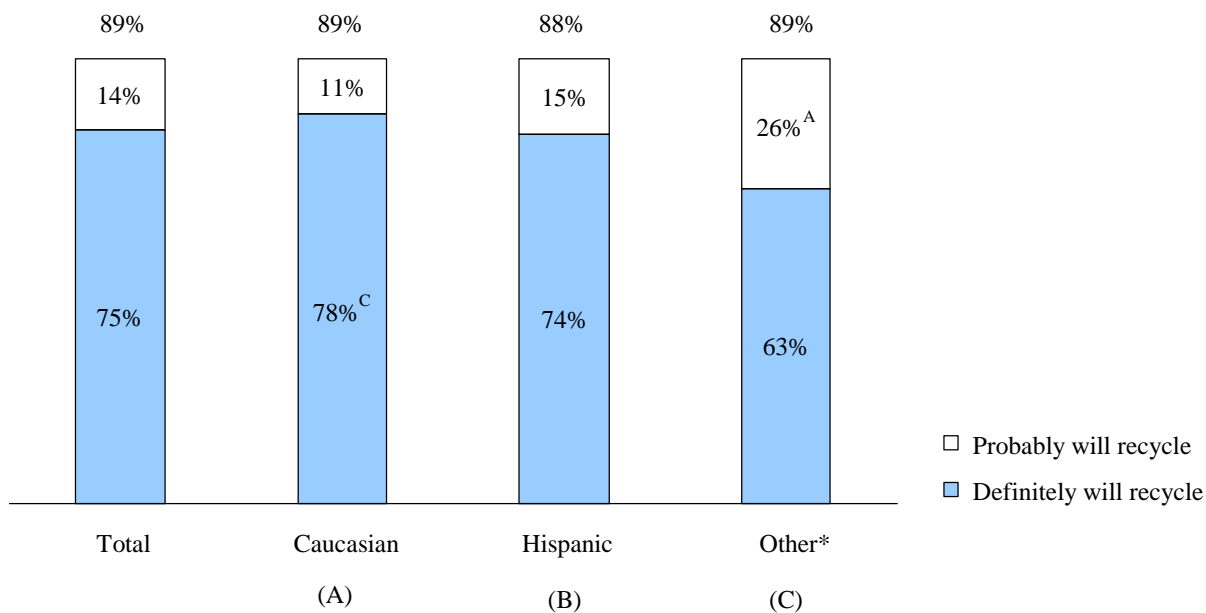
Recycling Behavior

While future interest in recycling is strong in general, non-Hispanic minorities are less committed to continuing their recycling in the future relative to other ethnic groups.

FUTURE INTENT TO RECYCLE

Among Total Respondents

By Ethnicity



Question 10 and 11: How likely is it that your household will recycle/will continue to recycle beverage bottle and containers in the future?

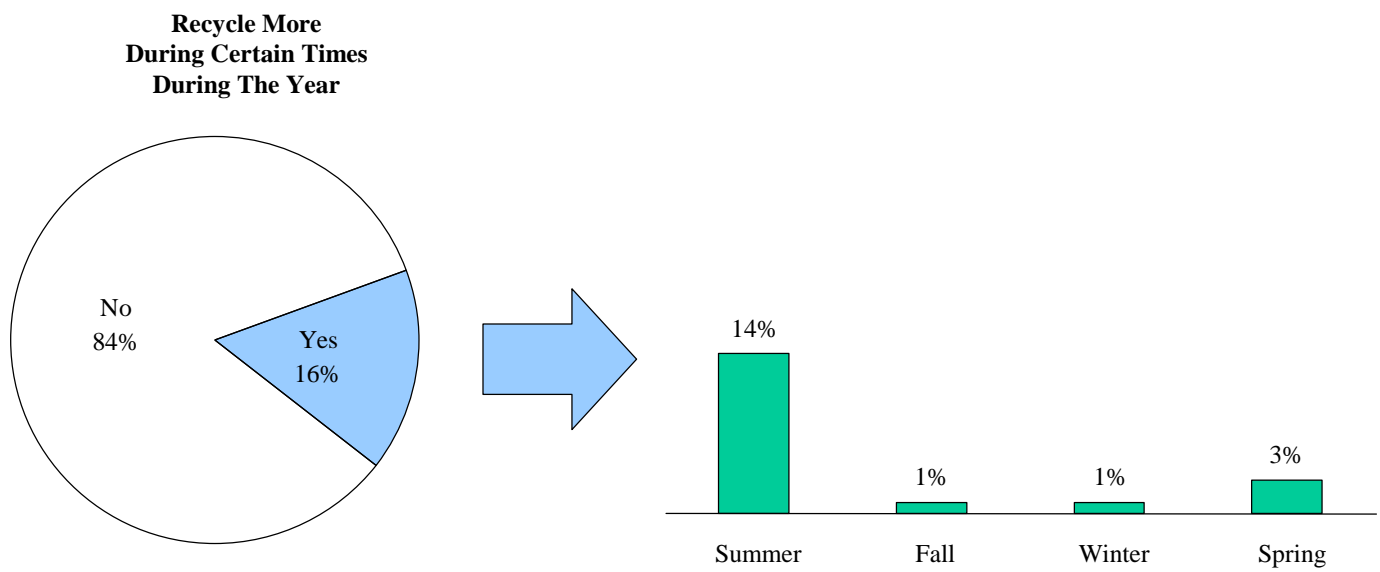
Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian, and American Indian.

Seasonal Recycling Habits

Only a few consumers' recycling is seasonal. However, those that do recycle more do so in the summer than any other time of the year.

RECYCLING MORE DURING CERTAIN SEASONS Among Total Respondents



Question 3c: Are you more likely to recycle during certain times of the year?

Question 3d: At what times during the year are you more likely to recycle? Any other times during the year?

Californian Needs More Recycling Bins

Monetary gain does not play a significant role for consumers in their recycling. The key drivers to recycling more is providing more bins at convenient locations.

REASONS CALIFORNIANS WOULD RECYCLE MORE WHEN AWAY FROM HOME Among Total Respondents

<u>Recycling method (Net)</u>	<u>70%</u>
<u>Amount of bins (sub-net)</u>	<u>34%</u>
There should be more bins available	31
Recycling bins should be everywhere	4
<u>Location of bins (sub-net)</u>	<u>26%</u>
Recycling bins should be at convenient locations	11
Recycling bins should be next to garbage cans	6
Parks / recreational areas should have recycling bins	4
<u>Type of recycling bins (sub-net)</u>	<u>6%</u>
Need standard recycling bins / bins should be a standard color	3
Recycling bins should be easy to see/ clearly marked/ labeled	3
More recycling centers / more convenient recycling centers	7%

<u>Cash back / rewards (Net)</u>	<u>6%</u>
Get paid more for recycling	3
Can get paid at machines / portable units	1
Get paid for recycling away from home	1
Money for recycling should go to charity	*
There should be more awareness of recycling	1
<u>Negative (Net)</u>	<u>11%</u>
Nothing / nothing could be done	6
Would rather take things home and recycle	3
Don't want to bother with recycling	1

*Less than 0.5%.

Question 3bx: Please tell me what would make you recycle more when you're away from home. In other words, what would make it easier for you to recycle away from home?

Chapter Three: Attitudes Towards Recycling

Over half of Californians feel recycling beverage containers is important, with 52% rating the importance of recycling a 9 or 10. Consumers' attitudes regarding the importance of recycling is based on their strong desire to keep the environment clean and their sense of personal responsibility, and it is these characteristics which motivate Californians to recycle, and their behavior is not influenced by their ethnicity or area. Additionally, recycling is not seen as a burden, so any inconveniences associated with recycling (i.e., time, space, commercial center location) generally do not prevent people from recycling, although this does vary by ethnicity.

- Those in the test market rate the importance of recycling relatively the same as those in the control market. All ethnic groups also feel recycling beverage containers is important, with little difference attitudinally among the ethnic subgroups. Both the test and control markets cite the main reason they recycle is to keep the environment clean. Consumers in the control market are also somewhat more motivated by the 2 1/2 cent refund offered per beverage container.
- Ethnic subgroups also feel they are motivated to recycle out of a concern for the environment. Caucasians, Hispanics, and non-Hispanic minorities all rate keeping the environment clean as the most influential factor when deciding whether or not to recycle. However, the inconveniences of recycling are seen somewhat of a barrier among non-Hispanic minorities. These consumers perceive the physical efforts of recycling more of a deterrent to recycling than Caucasians and Hispanics.

Recycling Importance

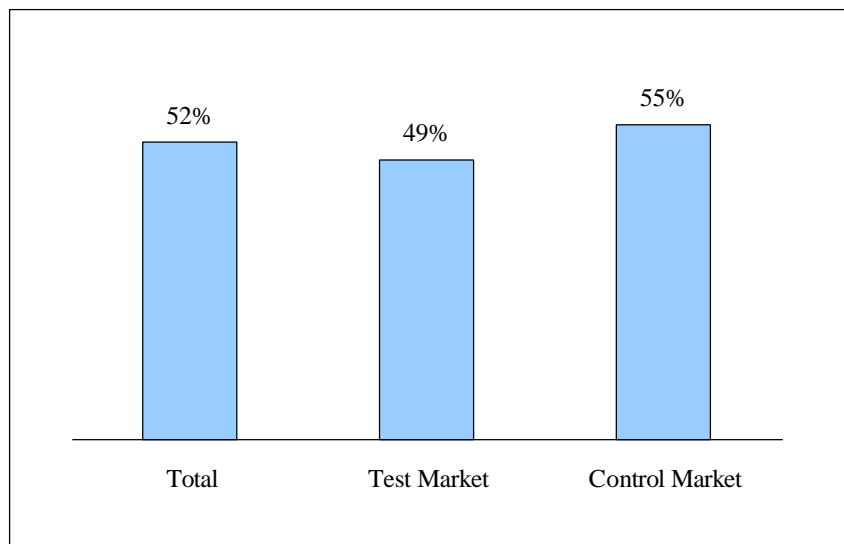
Over half of consumers feel that recycling beverage containers is extremely important. On a 10-point scale, 52% rated the importance of recycling a 9 or 10. These numbers also reflect those attitudes among the test (Los Angeles and Sacramento) and control (Chico and Bakersfield) markets, as the two markets have the same basic level of importance regarding recycling.

OVERALL IMPORTANCE OF RECYCLING

Percent Rating A 9 Or 10 On A 10-Point Scale

Among Total Respondents

By Market



Question 4a: On a 10-point scale, where a “1” means recycling beverage containers is not important at all and a “10” means recycling beverage containers is extremely important and everyone should be recycling, how important is recycling beverage containers to you?

Recycling Importance

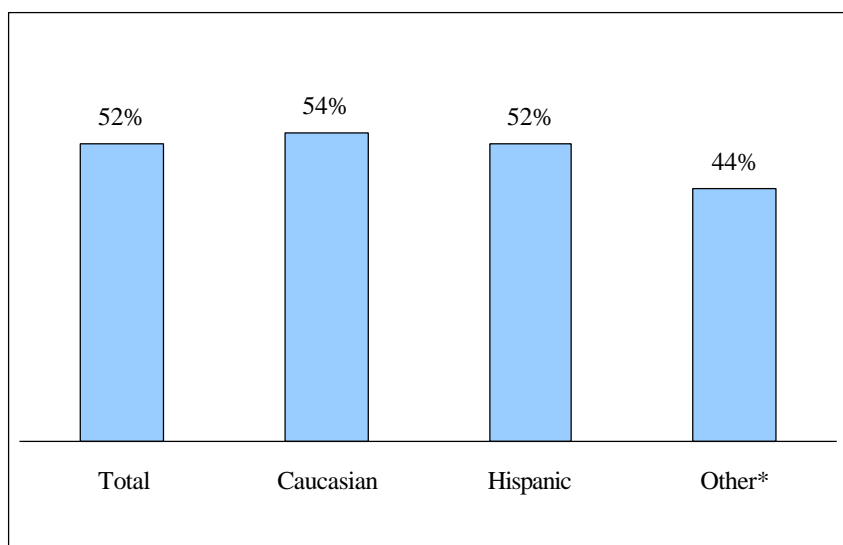
There is little difference attitudinally among ethnic subgroups regarding the importance of recycling. Slightly more than half of Caucasians and Hispanics claim that recycling beverage containers is extremely important, while just under half of non-Hispanic minorities believe that recycling is extremely important.

OVERALL IMPORTANCE OF RECYCLING

Percent Rating A 9 Or 10 On A 10-Point Scale

Among Total Respondents

By Ethnicity



Question 4a: On a 10-point scale, where a "1" means recycling beverage containers is not important at all and a "10" means recycling beverage containers is extremely important and everyone should be recycling, how important is recycling beverage containers to you?

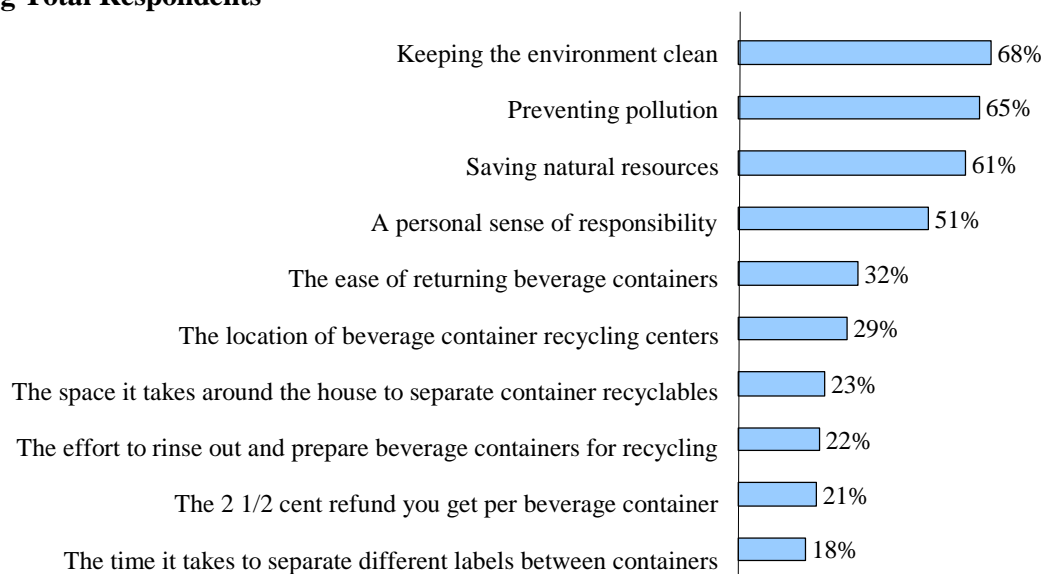
*"Other" includes: African American, Asian, and American Indian.

Influential Elements When Deciding To Recycle Beverage Containers

The environmental benefits of recycling far outweigh the inconveniences for most consumers. Most people base their decision to recycle on factors such as keeping the environment clean, preventing pollution, and saving natural resources. The inconveniences, such as separating recyclables and storing them around the house, do not appear to be a major barrier to recycling for the majority of people. Interestingly, the 2 ½ cent CRV refund is an influencing factor on recycling for only one consumer in five.

INFLUENTIAL ELEMENTS

Percent Rating A 9 Or 10 On A 10-Point Scale
Among Total Respondents



Question 4b; How much influence does(INSERT STATEMENT) have on your decision whether or not to recycle beverage containers?

Influential Elements When Deciding To Recycle Beverage Containers

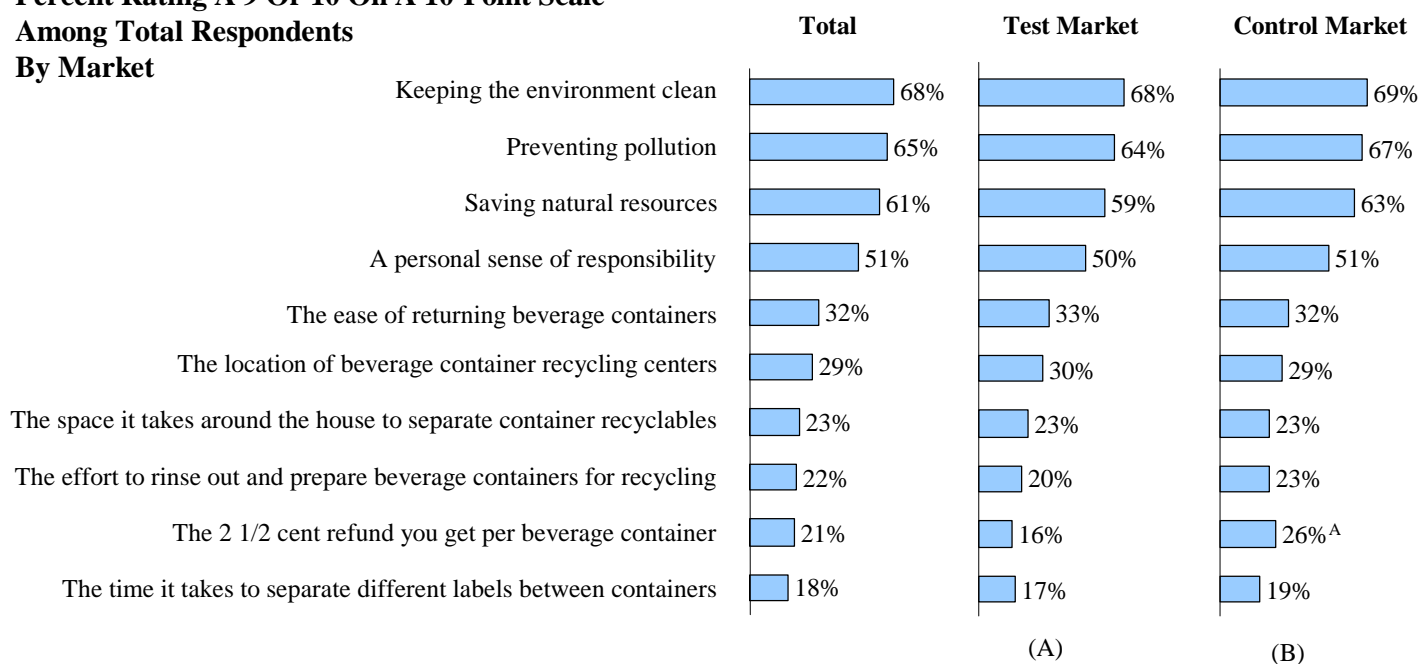
Influential elements do not vary much between the test and control markets. Keeping the environment clean, preventing pollution, and saving natural resources are the elements rated highest in each market, demonstrating the importance of protecting and caring for the environment regardless of location. Moreover, the inconveniences of recycling do not negatively influence their decision to recycle. Consumers in the control market find the 2 ½ cent CRV refund significantly more influential than those in the test market, further indicating the lack of effectiveness of the radio campaign.

INFLUENTIAL ELEMENTS

Percent Rating A 9 Or 10 On A 10-Point Scale

Among Total Respondents

By Market



Question 4b: How much influence does(INSERT STATEMENT) have on your decision whether or not to recycle beverage containers?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

Influential Elements When Deciding To Recycle Beverage Containers

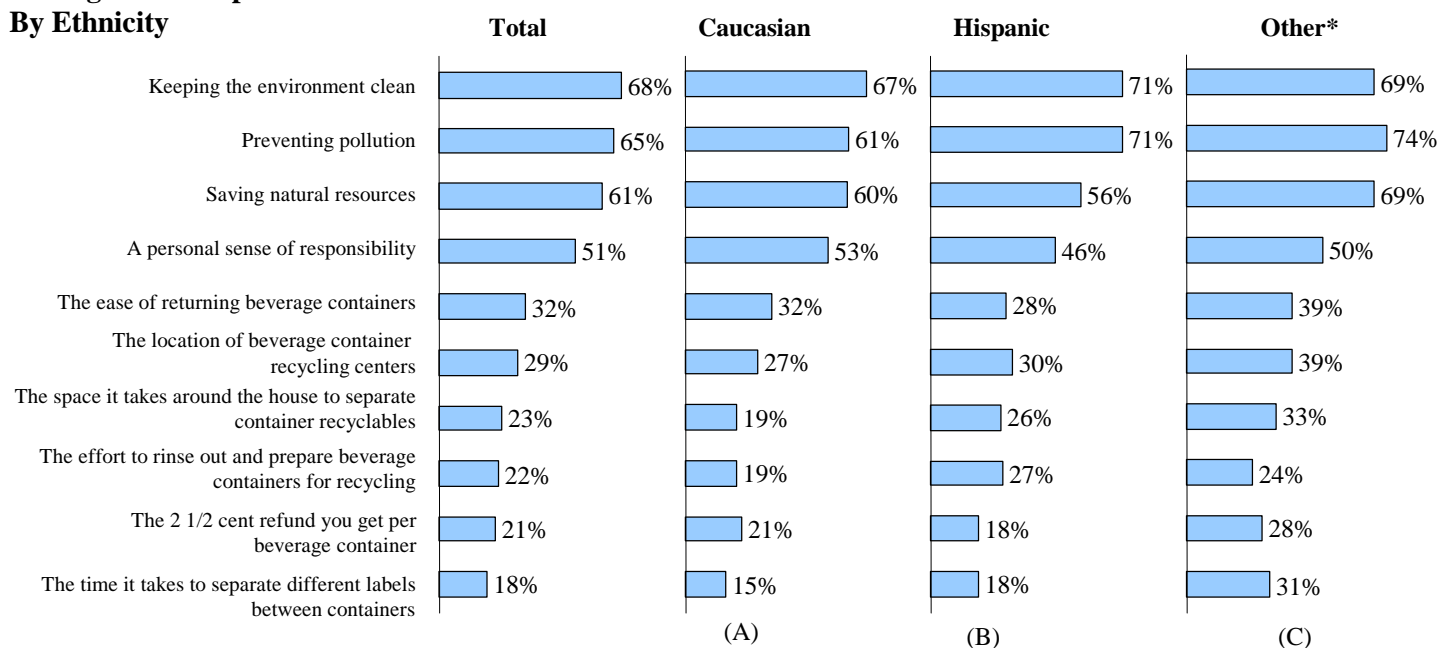
Californians are motivated to recycle by their desire to care for and protect the environment, regardless of ethnicity. Elements pertaining to the environment (keeping the environment clean, preventing pollution, and saving natural resources) are all rated highest among all ethnic groups. Preventing pollution is rated significantly more influential among Hispanics and non-Hispanic minorities. However, the physical demands required to recycle differ among ethnic groups. Non-Hispanic minorities find the time it takes to recycle, the effort to separate the containers, and the amount of space the containers take up inhibit their recycling behavior relative to Caucasians or Hispanics. Additionally, the CRV refund is more motivating for these consumers than for Caucasians and Hispanics.

INFLUENTIAL ELEMENTS

Percent Rating A 9 Or 10 On A 10-Point Scale

Among Total Respondents

By Ethnicity



Question 4b: How much influence does(INSERT STATEMENT) have on your decision whether or not to recycle beverage containers?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level

*" Other" includes: African American, Asian, and American Indian.

Chapter Four: Awareness And Impact Of CRV

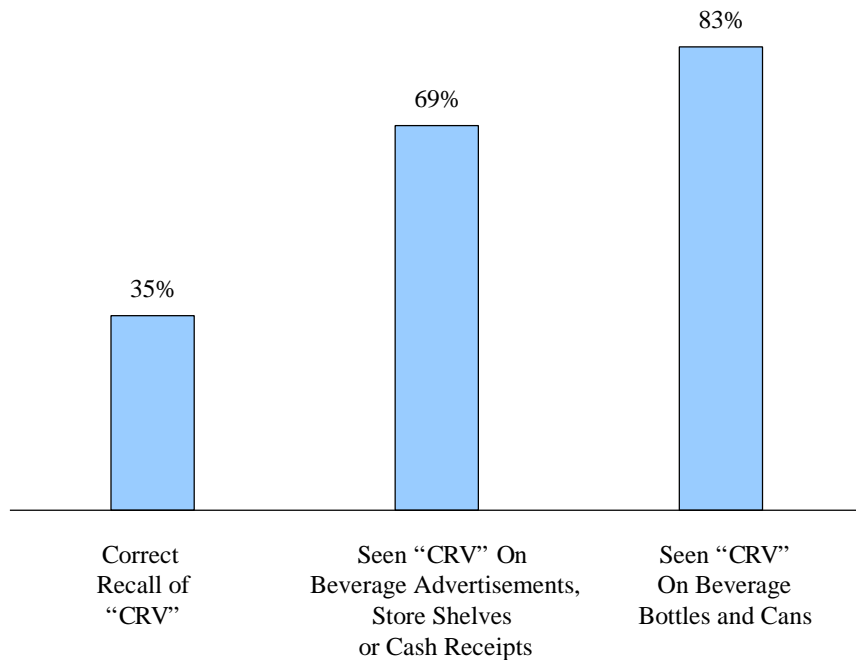
While consumers have cited seeing the CRV label on both store shelves and advertising, many consumers do not understand its correct meaning. Additionally, the redemption value given to consumers has little impact on overall recycling, although consumers are likely to redeem more given the knowledge of the 2 ½ cents redemption available for their beverage containers. Moreover, while consumers are aware that plastic, aluminum, and glass containers are included in the CRV program, consumers do not understand which specific cans and bottles can be redeemed, which may be adding to their confusion or lack of interest in the program.

- Consumers in the control markets have slightly higher awareness levels of CRV on beverage containers, reflecting their higher awareness and usage levels in general. Similarly, Caucasians also have higher CRV awareness levels relative to other ethnic groups, particularly the ability to correctly recall its meaning.
- Market and stronger recycling involvement (i.e., correct recall of CRV) do not have an impact on knowledge of which containers are included in the CRV program. However, Caucasians appear to be more aware of the new CRV bill, as these consumers are more aware of the newly added beverage containers available for redemption, such as wine, coffee, and sports drinks.
- While CRV has little influence on redeeming recyclables, those in the control markets, those correctly recalling the meaning of CRV, and Hispanics are the consumers more likely to take advantage of the offering. With the exception of Hispanics, these consumers are more involved in the recycling process in general, with stronger awareness and usage of specific individual recycling methods.

California Redemption Value Awareness

While most consumers recall seeing CRV on their bottles and cans and/or cash receipts, only a third of consumers can correctly identify its meaning.

CORRECT RECALL OF “CRV” AND PENETRATION IN THE MARKETPLACE Among Total Respondents



Question 6a: What do the letters "CRV" represent or stand for?

Question 6b: Have you ever seen the phrase "California Redemption Value" or "California Cash Refund" on beverage bottles or cans?

Question 7: Have you ever seen the letters "CRV" on beverage advertisements, store shelves, or on cash receipts?

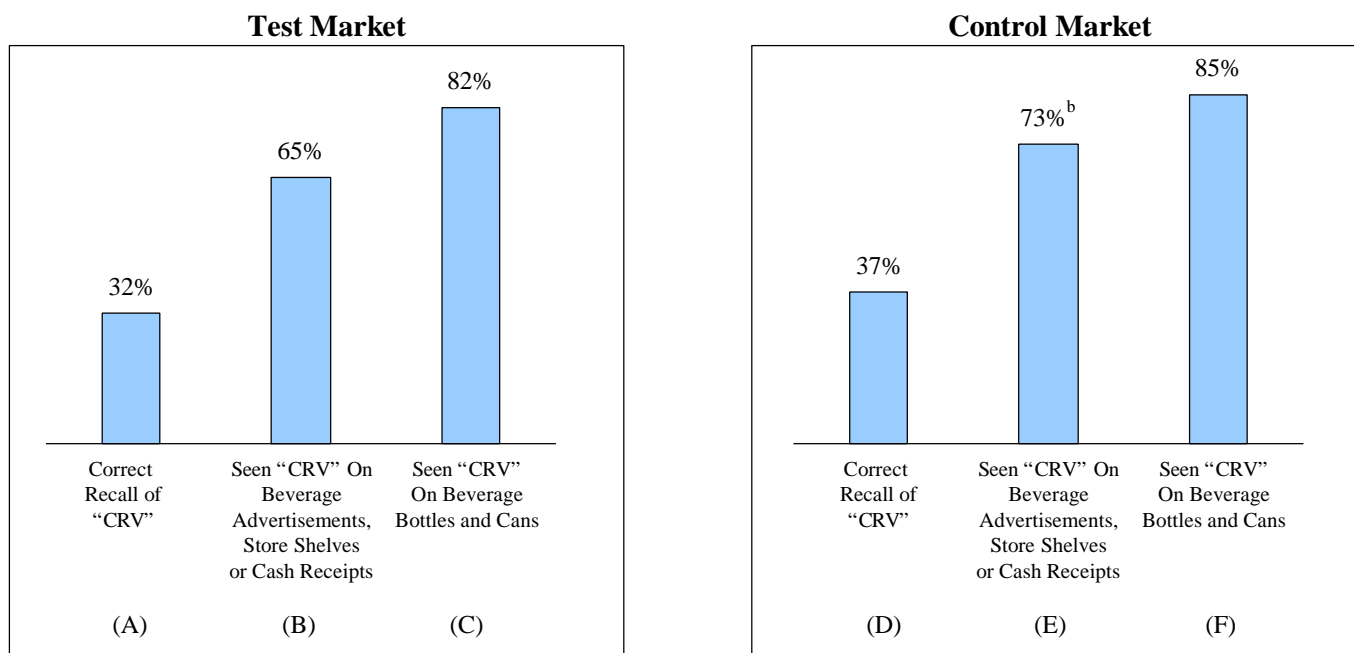
California Redemption Value Awareness

Control market consumers have higher CRV awareness levels, reflecting their slightly stronger overall awareness levels and recycling habits. This is unexpected given the radio campaign was not broadcast in these areas.

CORRECT RECALL OF “CRV” AND PENETRATION IN THE MARKETPLACE

Among Total Respondents

By Market



Question 6a: What do the letters “CRV” represent or stand for?

Question 6b: Have you ever seen the phrase “California Redemption Value” or “California Cash Refund” on beverage bottles or cans?

Question 7: Have you ever seen the letters “CRV” on beverage advertisements, store shelves, or on cash receipts?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

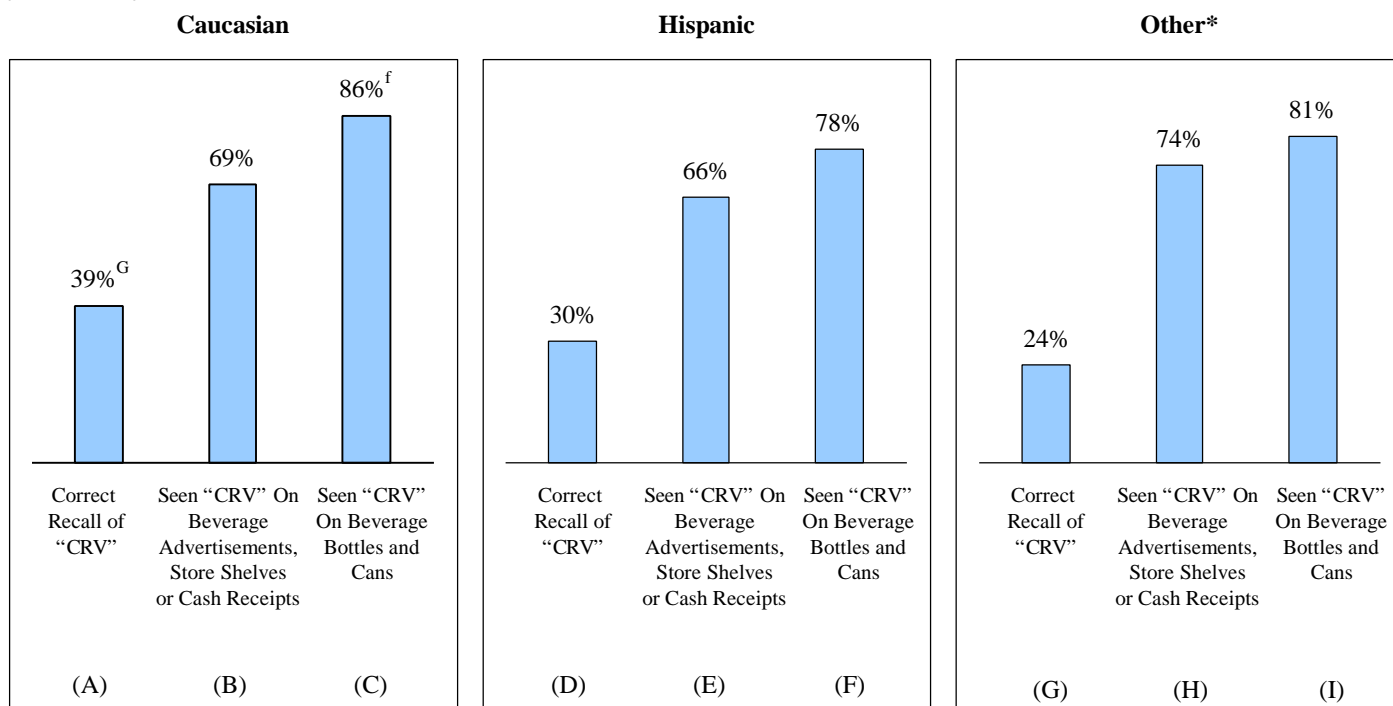
California Redemption Value Awareness

Caucasians are more likely to correctly recall the meaning of CRV, whereas both Caucasians and non-Hispanic minorities mention seeing CRV more on receipts and store shelves, as well as on bottles and cans.

CORRECT RECALL OF “CRV” AND PENETRATION IN THE MARKETPLACE

Among Total Respondents

By Ethnicity



Question 6a: What do the letters “CRV” represent or stand for?

Question 6b: Have you ever seen the phrase “California Redemption Value” or “California Cash Refund” on beverage bottles or cans?

Question 7: Have you ever seen the letters “CRV” on beverage advertisements, store shelves, or on cash receipts?

*“Other” includes: African American, Asian, and American Indian.

California Redemption Value Program Awareness

Consumers generally understand that aluminum, plastic, and glass containers are included in the CRV program. However, there is some confusion as to which specific types of bottles and cans are accepted, although consumers' knowledge of beverage containers included in the CRV program does not differ by area.

CALIFORNIA'S KNOWLEDGE OF BEVERAGE CONTAINERS INCLUDED IN THE CRV PROGRAM

Among Total Respondents

By Market

	Total (N=409)	Test Market (N=206)	Control Market (N=203)
Aluminum cans (non-specific)	61%	61%	60%
Plastic bottles (non-specific)	52	53	51
Glass bottles (non-specific)	38	38	39
Carbonated soft drinks	31	31	31
Beer and malt beverages	22	20	23
100% fruit juices	8	8	8
Milk	7	9	5
Carbonated mineral and soda water	5	6	4
Sport drinks	3	3	3
Non-carbonated water	3	3	3
Wine	2	1	3
Carbonated and non-carbonated fruit drinks	2	2	2
Coffee and tea drinks	2	2	2
Wine coolers and distilled spirit coolers	1	*	2
Diet/health drinks	1	*	1

*Less than 0.5%.

Question 8: As far as you know, what beverage containers are included in the "California Redemption Value" Program?

California Redemption Value Program Awareness

Caucasians, and to a lesser extent Hispanics, are more aware of the beverage containers included in the CRV program than non-Hispanic minorities.

CALIFORNIA'S KNOWLEDGE OF BEVERAGE CONTAINERS INCLUDED IN THE CRV PROGRAM Among Total Respondents By Ethnicity

	Total (N=409)	Caucasian (N=258)	Hispanic (N=96)	Other* (N=54)
Aluminum cans (non-specific)	61%	64% ^b	54%	56%
Plastic bottles (non-specific)	52	55 ^c	50	41
Glass bottles (non-specific)	38	43 ^C	35 ^C	20
Carbonated soft drinks	31	31	25	37
Beer and malt beverages	22	21	22	24
100% fruit juices	8	9	7	7
Milk	7	7	8	4
Carbonated mineral and soda water	5	5	4	7
Sport drinks	3	3 ^C	6 ^C	-
Non-carbonated water	3	4 ^b	1	2
Wine	2	3 ^C	2	-
Carbonated and non-carbonated fruit drinks	2	2 ^C	4 ^C	-
Coffee and tea drinks	2	2 ^C	2	-
Wine coolers and distilled spirit coolers	1	1	1	2
Diet/health drinks	1	1	2	-
		(A)	(B)	(C)

Question 8: As far as you know, what beverage containers are included in the "California Redemption Value" Program?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian, and American Indian.

California Redemption Value Program Awareness

Additionally, consumers' correct recall of CRV does not impact their awareness of containers included in the program.

CALIFORNIA'S KNOWLEDGE OF BEVERAGE CONTAINERS INCLUDED IN THE CRV PROGRAM Among Total Respondents By CRV Awareness

	Total (N=409)	Correct Recall of CRV (N=142)	Incorrect Recall Of CRV (N=264)
Aluminum cans (non-specific)	61%	73% ^B	54%
Plastic bottles (non-specific)	52	68 ^B	44
Glass bottles (non-specific)	38	48 ^B	34
Carbonated soft drinks	31	31	30
Beer and malt beverages	22	21	22
100% fruit juices	8	8	8
Milk	7	8	6
Carbonated mineral and soda water	5	6	5
Sport drinks	3	4	3
Non-carbonated water	3	4	2
Wine	2	3	2
Carbonated and non-carbonated fruit drinks	2	4	2
Coffee and tea drinks	2	2	2
Wine coolers and distilled spirit coolers	1	2	1
Diet/health drinks	1	2	*
		(A)	(B)

*Less than 0.5%.

Question 8: As far as you know, what beverage containers are included in the "California Redemption Value" Program?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

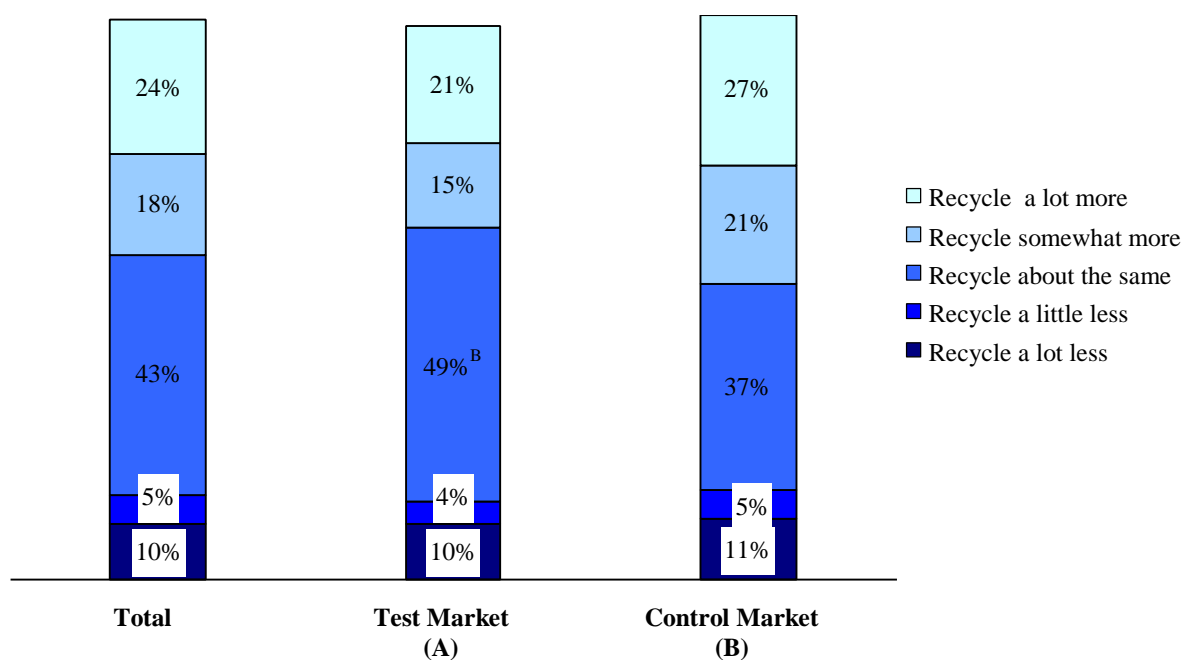
CRV Influence On Recycling Habits

Just as the control markets are more likely to recycle, these consumers are also more likely to be influenced by the redemption value.

INFLUENCE OF REDEMPTION ON RECYCLABLES

Among Total Respondents

By Market



Question 9: How much influence does the "California Redemption Value" on beverage bottles and cans have on your redeeming recyclable beverage containers?"

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian, and American Indian.

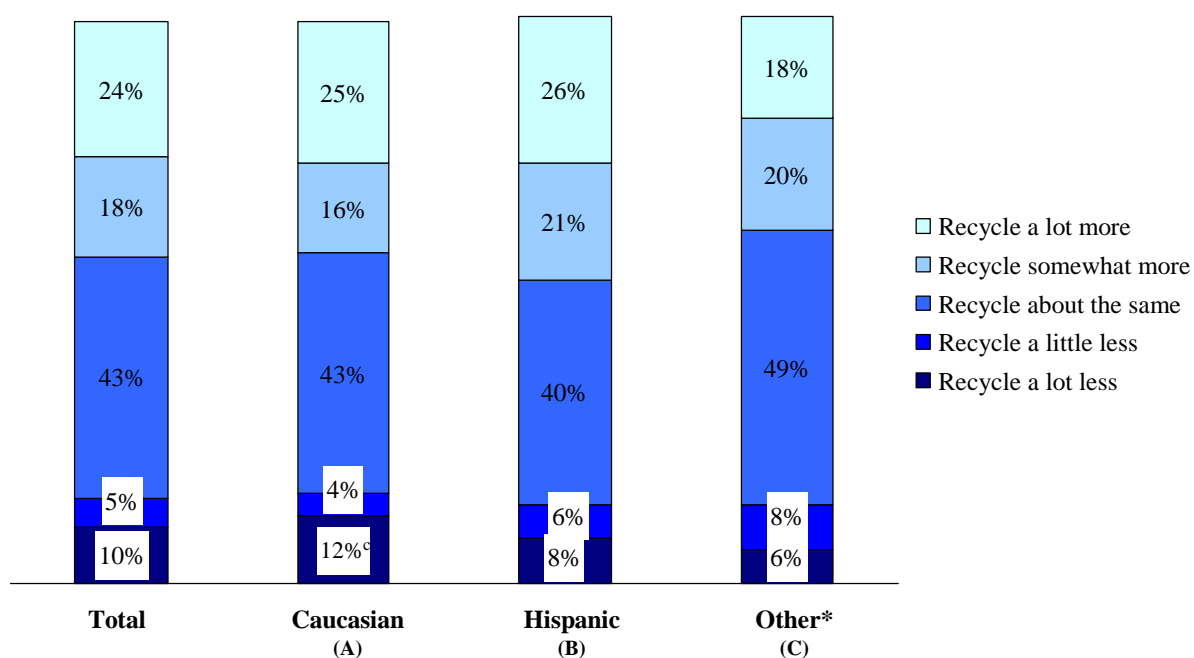
CRV Influence On Recycling Habits

Hispanics claim to be the ethnic group most influenced by the redemption value the CRV program provides.

INFLUENCE OF REDEMPTION ON RECYCLABLES

Among Total Respondents

By Ethnicity



Question 9: How much influence does the "California Redemption Value" on beverage bottles and cans have on your redeeming recyclable beverage containers?"

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

*"Other" includes: African American, Asian, and American Indian.

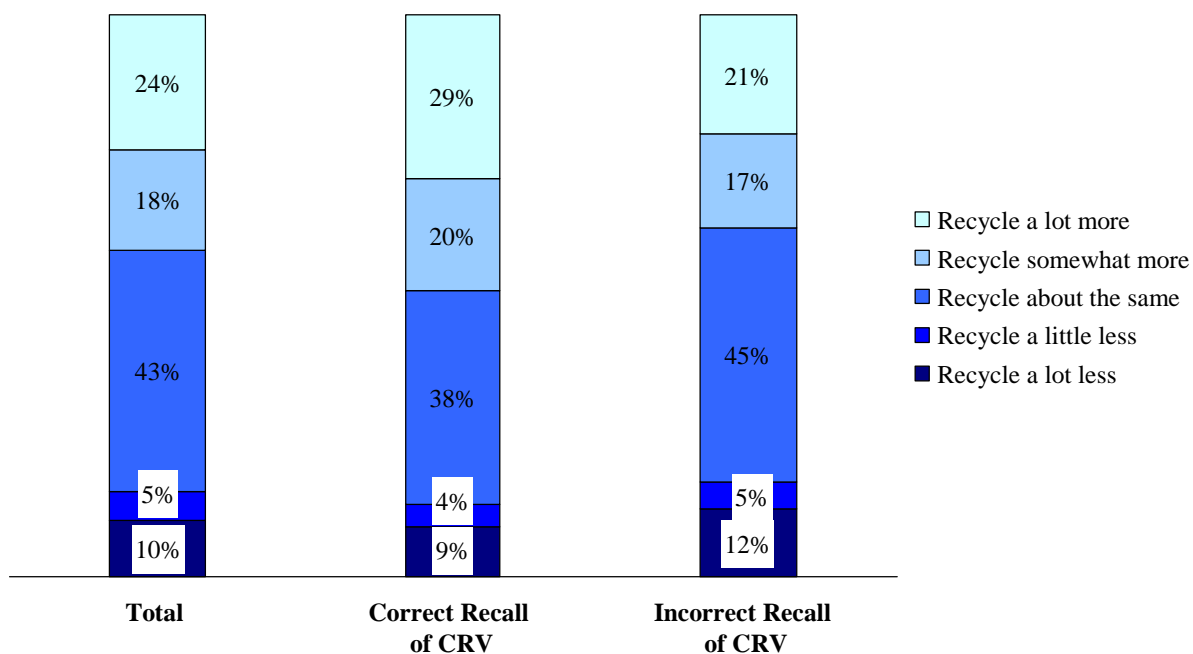
CRV Influence On Recycling Habits

While CRV does not have much influence on redeeming recyclables, consumers correctly recalling CRV are slightly more likely to take advantage of the redemption.

INFLUENCE OF REDEMPTION ON RECYCLABLES

Among Total Respondents

By CRV Awareness

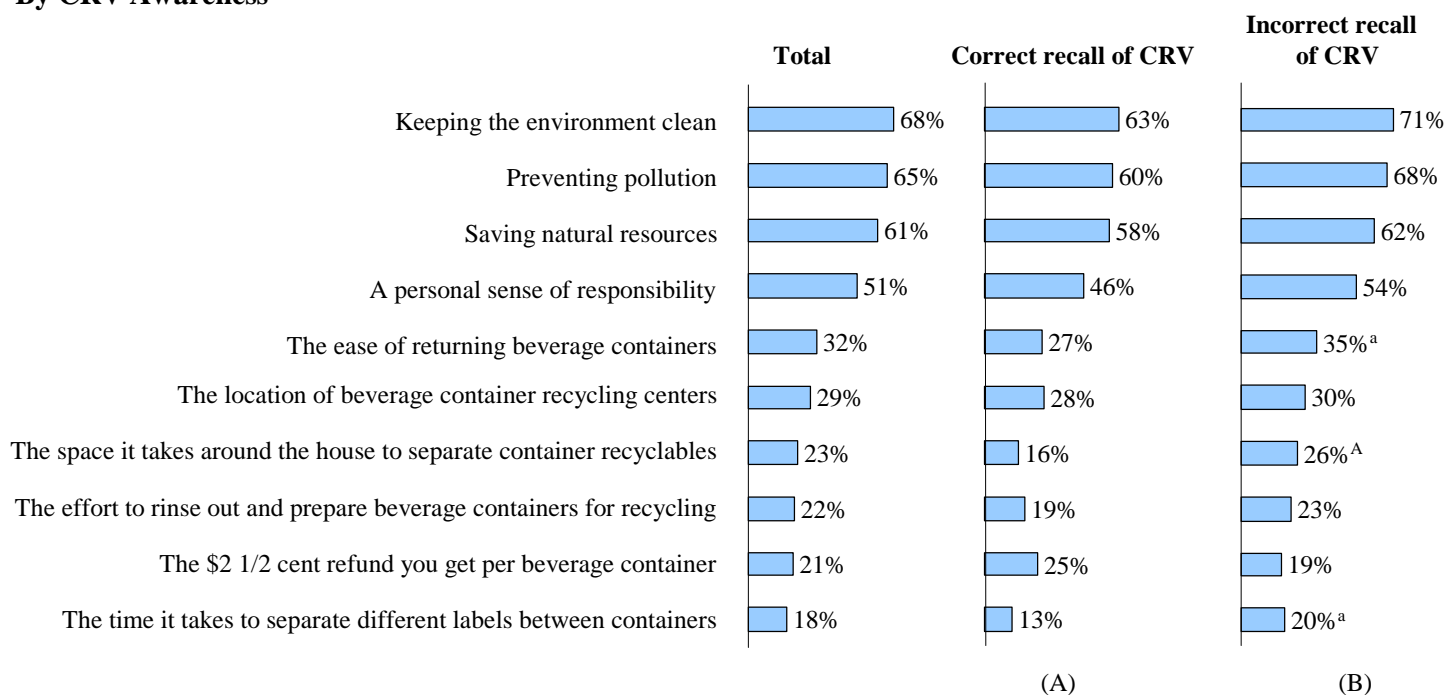


Question 9: How much influence does the "California Redemption Value" on beverage bottles and cans have on your redeeming recyclable beverage containers?"

Influential Elements When Deciding To Recycle Beverage Containers

Consumers not impacted by CRV are more influenced by the ease of returning their containers, as well as by time and available space.

INFLUENTIAL ELEMENTS Percent Rating A 9 Or 10-Point Scale Among Total Respondents By CRV Awareness



Question 4b: How much influence does (INSERT STATEMENT) have on your decision whether or not to recycle beverage containers?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

Appendix

Awareness of Beverage Recycling Programs

RECYCLING PROGRAM AWARENESS Among Total Respondents By Market

	<u>Total</u>		<u>Los Angeles</u>		<u>Sacramento</u>		<u>Chico</u>		<u>Bakersfield</u>	
	<u>Unaided</u>	<u>Total</u>	<u>Unaided</u>	<u>Total</u>	<u>Unaided</u>	<u>Total</u>	<u>Unaided</u>	<u>Total</u>	<u>Unaided</u>	<u>Total</u>
Bring containers to commercial center	50%	90%	44%	85%	49%	86%	53%	95% ^{BD}	54%	93% ^b
Curbside recycling using special bins	42	83	55 ^{EG}	88 ^H	56 ^{EG}	96 ^{BFH}	39 ^G	86 ^H	16	62
Returning containers to staffed parking lot	21	85	25 ^g	79	29 ^{EG}	90 ^{Bh}	17	88 ^b	15	81
Bring containers to self-service center	7	64	11 ^{cE}	76 ^{DF}	5 ^e	53	1	56	12 ^{cE}	70 ^{DF}
Donate containers in drop-off bin	5	54	4	45	5	52	5	55	6	65 ^{Bd}
Give containers to charity	3	60	5	52	1	51	4	70 ^{BD}	2	66 ^{BD}
Throw recyclables away with normal garbage	2	84	3	83	1	87	2	81	2	86
			(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)

Question 1a: (unaided) What are the ways that beverage containers can be recycled that you are aware of?

Question 1b: (aided) Have you ever heard of...? (READ ALL WAYS NOT MENTIONED IN Q1a)

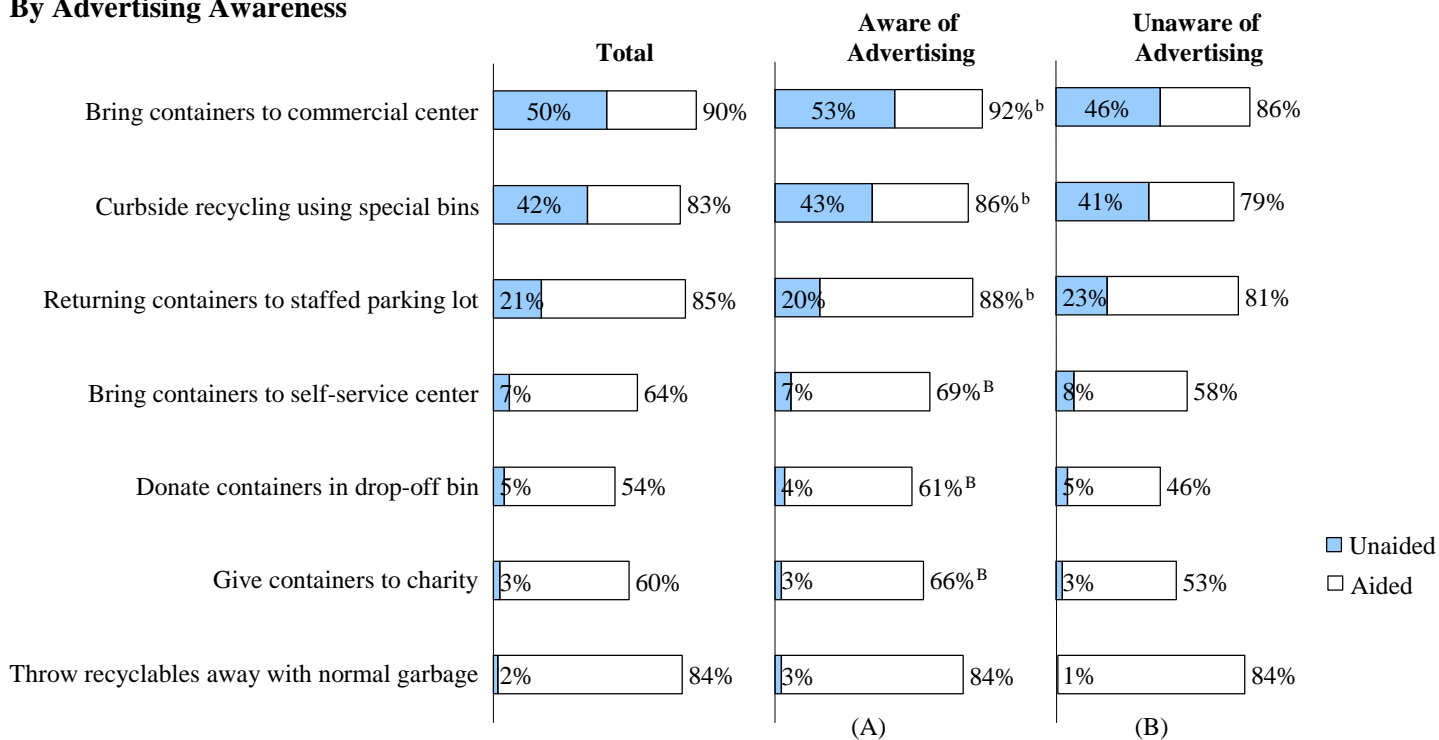
Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

Awareness of Beverage Recycling Programs

RECYCLING PROGRAM AWARENESS

Among Total Respondents

By Advertising Awareness



Question 1a: (unaided) What are the ways that beverage containers can be recycled that you are aware of?

Question 1b: (aided) Have you ever heard of...? (READ ALL WAYS NOT MENTIONED IN Q1a)

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

Availability of Recycling Programs

RECYCLING PROGRAM AVAILABILITY Among Total Respondents By Market

	<u>Total</u>	<u>Los Angeles</u>	<u>Sacramento</u>	<u>Chico</u>	<u>Bakersfield</u>
Bring containers to commercial center	55%	48%	50%	66% ^{AB}	58%
Returning containers to staffed parking lot	54	48	55	57	56
Curbside recycling using special bins	44	60 ^D	56 ^D	51 ^D	9
Throw recyclables away with normal garbage	33	30	35	33	33
Bring containers to self-service center	22	25 ^C	22	14	27 ^C
Give containers to charity	21	18	17	28 ^{AB}	22
Donate containers in drop-off bin	14	10	8	13	25 ^{ABC}
		(A)	(B)	(C)	(D)

Question 1c: What beverage container recycling programs or ways that beverage containers can be recycled are there available in your neighborhood or community?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

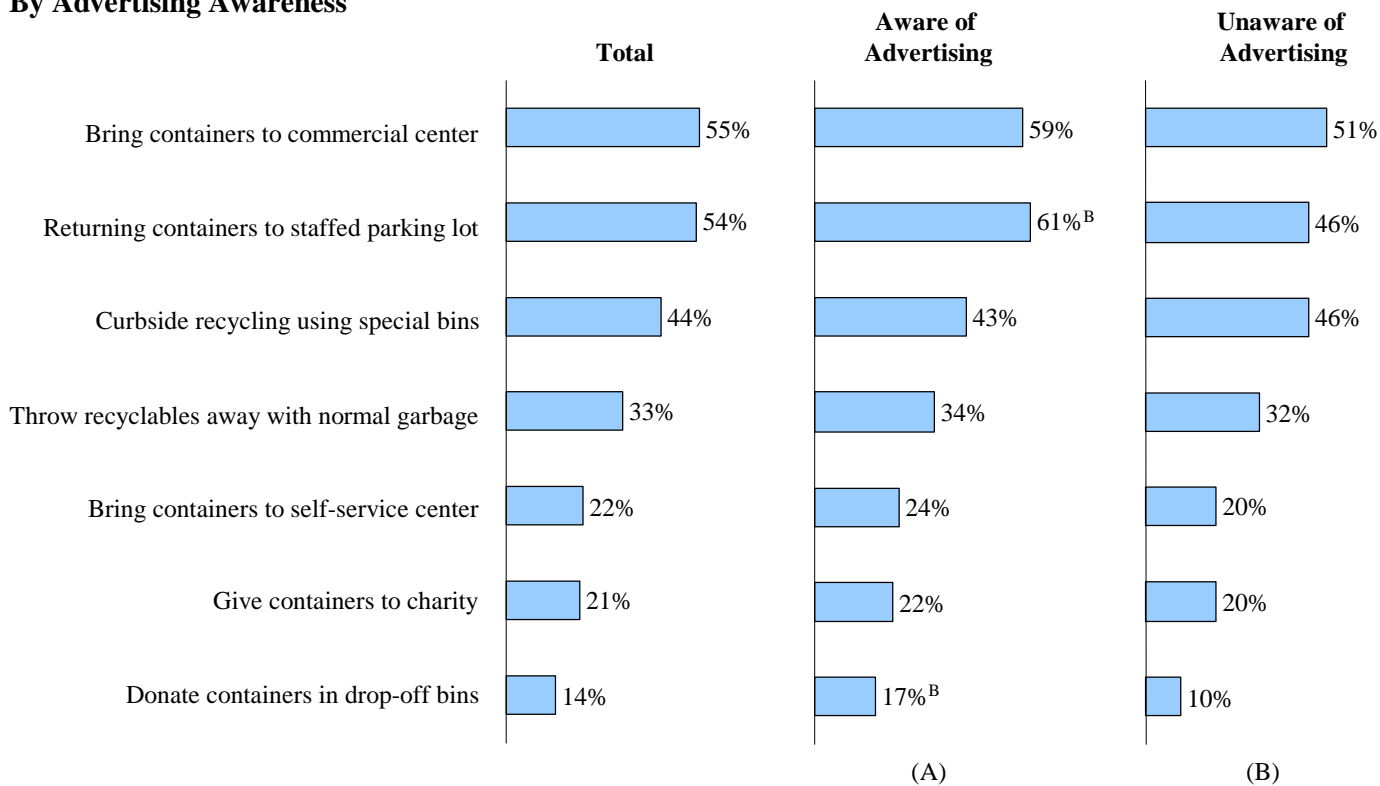
[†]Accessibility is based on respondent's knowledge of programs available in the neighborhood and may not reflect actual availability.

Availability of Beverage Recycling Programs

RECYCLING PROGRAM AVAILABILITY[†]

Among Total Respondents

By Advertising Awareness



Question 1c: What beverage container recycling programs or ways that beverage containers can be recycled are there available in your neighborhood or community?

[†]Accessibility is based on respondent's knowledge of programs available in their neighborhood and may not reflect actual availability.

Recycling Usage

RECYCLING PROGRAMS UTILIZED WHILE AT HOME

Among Total Respondents

By Market

	<u>Total</u>		<u>Los Angeles</u>		<u>Sacramento</u>		<u>Chico</u>		<u>Bakersfield</u>	
	<u>Currently Use</u>	<u>Use Most Often</u>	<u>Currently Use</u>	<u>Use Most Often</u>	<u>Currently Use</u>	<u>Use Most Often</u>	<u>Currently Use</u>	<u>Use Most Often</u>	<u>Currently Use</u>	<u>Use Most Often</u>
Bring containers to commercial center	38%	31%	26%	20%	30%	24%	49% ^{AC}	37% ^{BD}	48% ^{AC}	43% ^{BD}
Curbside recycling using special bins	33	28	50 ^{EG}	40 ^{EH}	43 ^G	42 ^{FH}	33 ^G	28 ^H	4	2
Returning containers to staffed parking lot	19	13	17	10	17	10	19	14	25	20 ^{BD}
Throw recyclables away with normal garbage	14	11	13	10	13	12	10	6	22 ^{CE}	16 ^F
Give containers to charity	6	2	5	2	7	2	5	2	6	3
Bring containers to self-service center	4	2	5	3	2	1	3	1	6	3
Donate containers in drop-off bin	3	2	1	1	1	1	4	2	5 ^{ac}	3
			(A)	(B)	(C)	(D)	(E)	(F)	(G)	(H)

Question 2a: I'd like you to think about beverage containers which may be recycled while you are at home. Which programs or ways do you or anyone in your household currently use to recycle beverage containers when you are at home?

Question 2b: And, which of these programs or ways do you or someone in your household use most often?

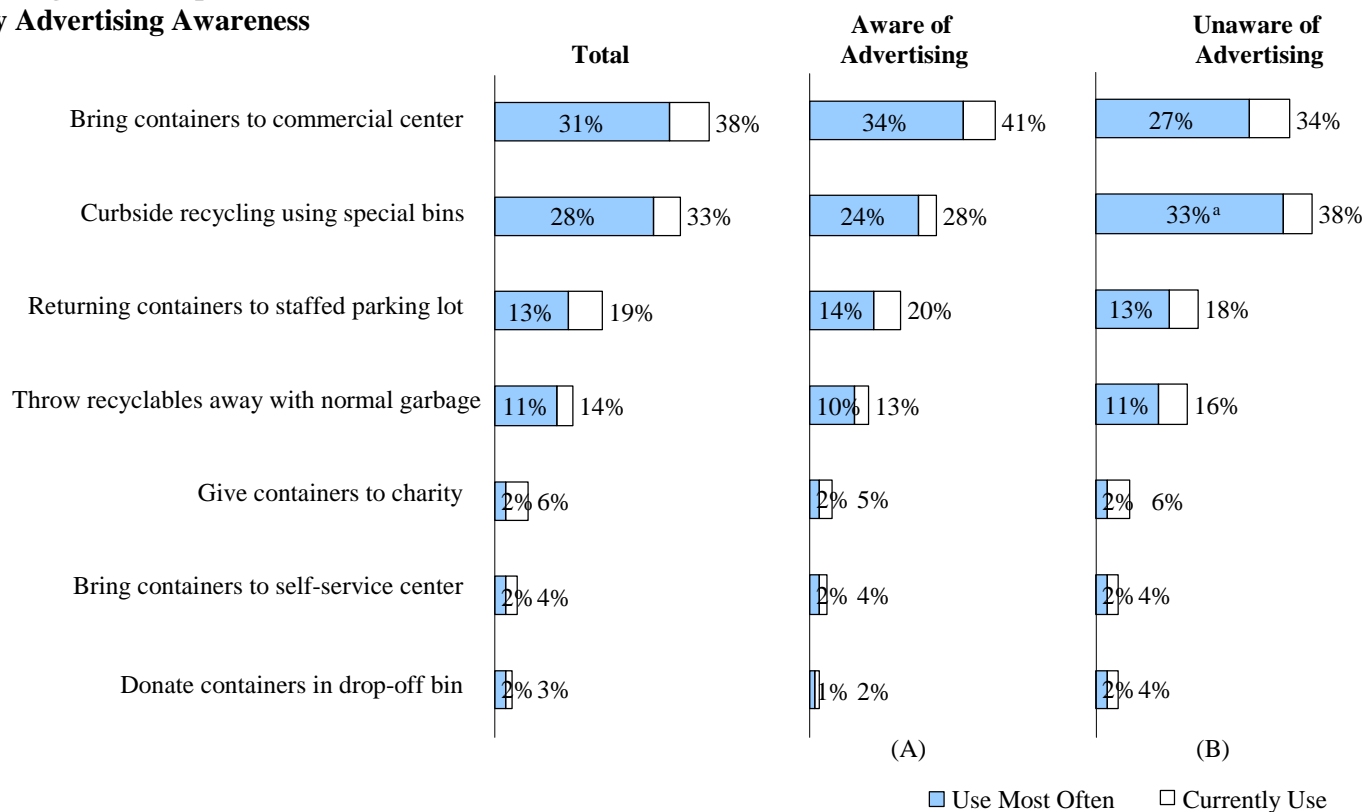
Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level

Recycling Usage

RECYCLING PROGRAM UTILIZED AT HOME

Among Total Respondents

By Advertising Awareness



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Question 2b: And, which of these programs or ways do you or someone in your household use most often?

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Recycling Usage

RECYCLING PROGRAMS UTILIZED WHILE AT WORK OR SCHOOL Among Total Respondents By Market

	<u>Total</u>	<u>Los Angeles</u>	<u>Sacramento</u>	<u>Chico</u>	<u>Bakersfield</u>
Recycle containers at nearest recycling bin	41%	35%	47% ^a	41%	41%
Bring containers home to recycle	29	24	31	37 ^{Ad}	26
Throw away containers wherever convenient	27	35 ^{bc}	24	21	29
Throw recyclables away with normal garbage	8	6	8	7	13 ^a
Bring containers to commercial center	5	2	5	7 ^a	8 ^A
Curbside recycling using special bins	4	5	5	4	2
Give containers to charity	4	2	7 ^{ad}	5	2
Donate containers in drop-off bin	3	2	6	3	3
None	13	13	16	14	9
		(A)	(B)	(C)	(D)

Question 3a: Which of the following programs or ways do you currently use to recycle beverage containers at work or school if any?

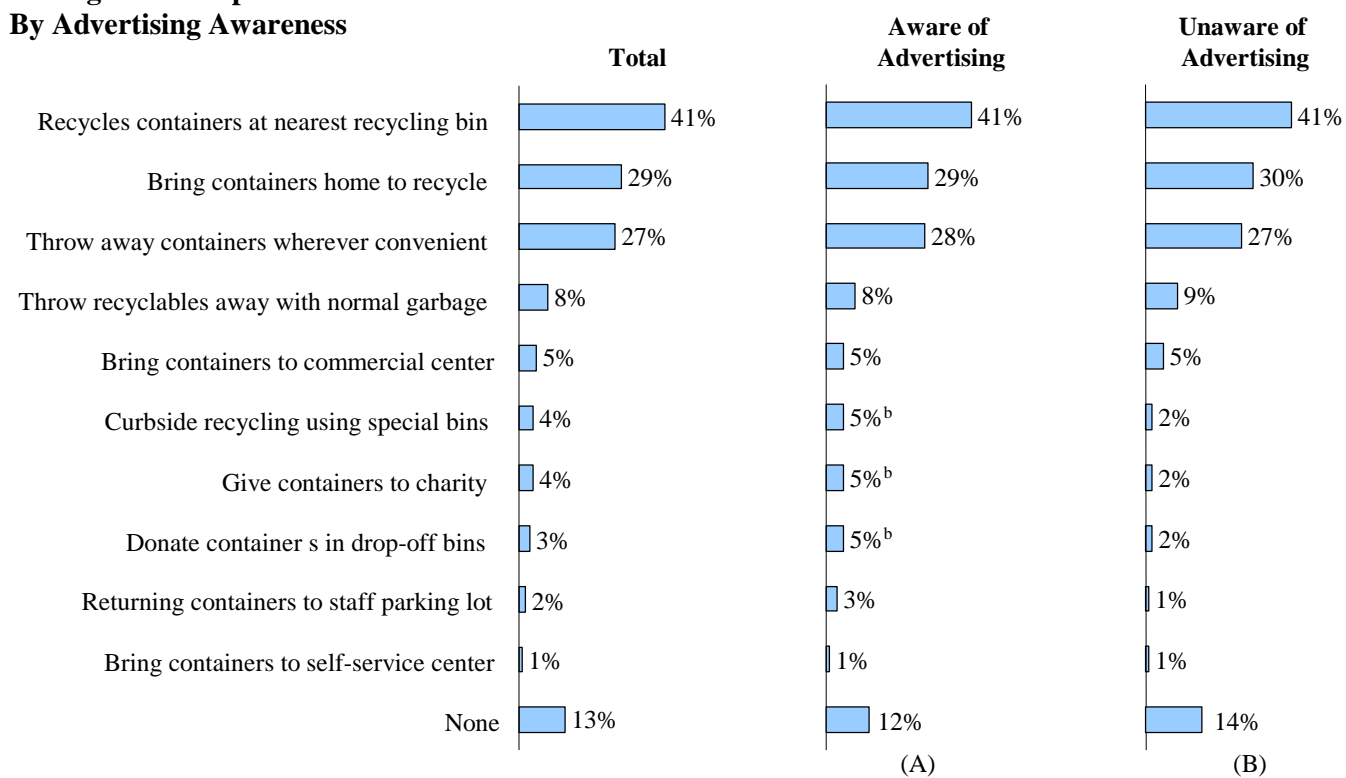
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Recycling Usage

RECYCLING PROGRAMS UTILIZED WHILE AT WORK OR SCHOOL

Among Total Respondents

By Advertising Awareness



Question 3a: Which of the following programs or ways do you currently use to recycle beverage containers at work or school if any?

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Recycling Usage

RECYCLING PROGRAMS UTILIZED WHILE INVOLVED IN RECREATIONAL ACTIVITIES Among Total Respondents By Market

	<u>Total</u>	<u>Los Angeles</u>	<u>Sacramento</u>	<u>Chico</u>	<u>Bakersfield</u>
Bring containers home to recycle	51%	42%	48%	63% ^{ABd}	50%
Throw away containers wherever convenient	44	50 ^C	47	35	46
Recycle containers at nearest recycling bin	32	36 ^c	41 ^{CD}	25	27
Bring containers to commercial center	2	4 ^B	-	2	2
None	5	8	5	3	4
		(A)	(B)	(C)	(D)

Question 3b: And, when you are outside of your home, involved in recreational activities, such as a road trip, picnic, camping, boating or a sporting event. Which programs or ways do you currently use to recycle beverage containers while you're away from home, involved in recreational activities, if any?

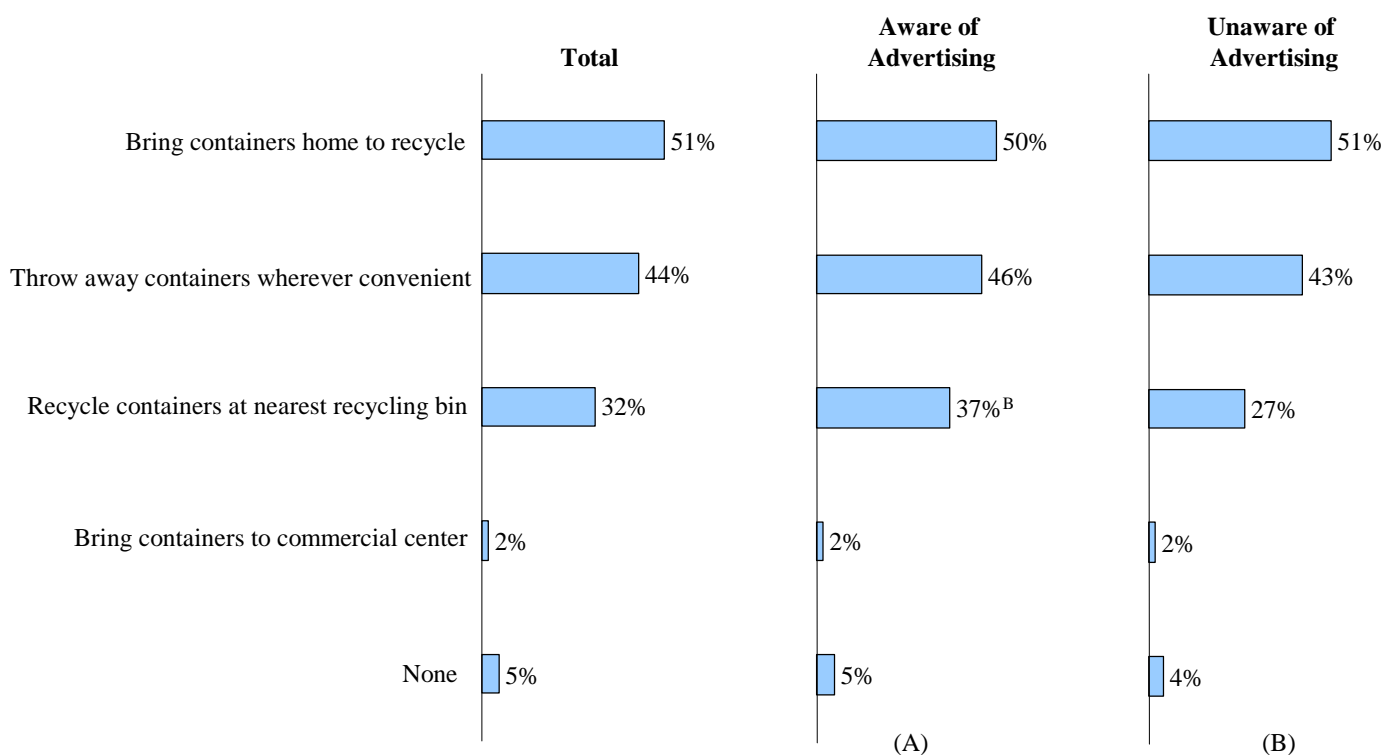
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Recycling Usage

RECYCLING PROGRAMS UTILIZED WHILE INVOLVED IN RECREATIONAL ACTIVITIES

Among Total Respondents

By Advertising Awareness



Question 3b: And, when you are outside of your home, involved in recreational activities, such as a road trip, picnic, camping, boating or a sporting event. Which programs or ways do you currently use to recycle beverage containers while you're away from home, involved in recreational activities, if any?

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Influential Elements When Deciding To Recycle Beverage Containers

INFLUENTIAL ELEMENTS Percent Rating A 9 Or 10-Point Scale Among Total Respondents By Market

	<u>Total</u>	<u>Los Angeles</u>	<u>Sacramento</u>	<u>Chico</u>	<u>Bakersfield</u>
Overall importance rating of recycling beverage containers	52%	44%	54%	60%	50%
Keeping the environment clean	68%	70%	66%	71%	67%
Preventing pollution	65	66	62	67	66
Saving natural resources	61	60	57	68	57
A personal sense of responsibility	51	47	54	52	50
The ease of returning beverage containers	32	26	41 ^A	30	33
The location of beverage container recycling centers	29	31	28	24	35 ^c
The space it takes around the house to separate beverage container recyclables	23	22	24	23	24
The effort to rinse out and prepare beverage containers for recycling	22	19	21	25	22
The \$2 1/2 cent refund you get per beverage container	21	13	19	29 ^{Ab}	23 ^a
The time it takes to separate different recyclables beverage containers	18	14	20	19	19
		(A)	(B)	(C)	(D)

Question 4a: On a scale from 1 to 10, where 1 means recycling beverage containers is not important at all and 10 means recycling beverage containers is extremely important and everyone should be recycling, how important is recycling beverage containers to you?

Question 4b: How much influence does (INSERT STATEMENT) have on your decision whether or not to recycle beverage containers?

Note: Capital letters denote statistical significance at the 95% confidence level. Lower case letters denote statistical significance at the 90 % confidence level.

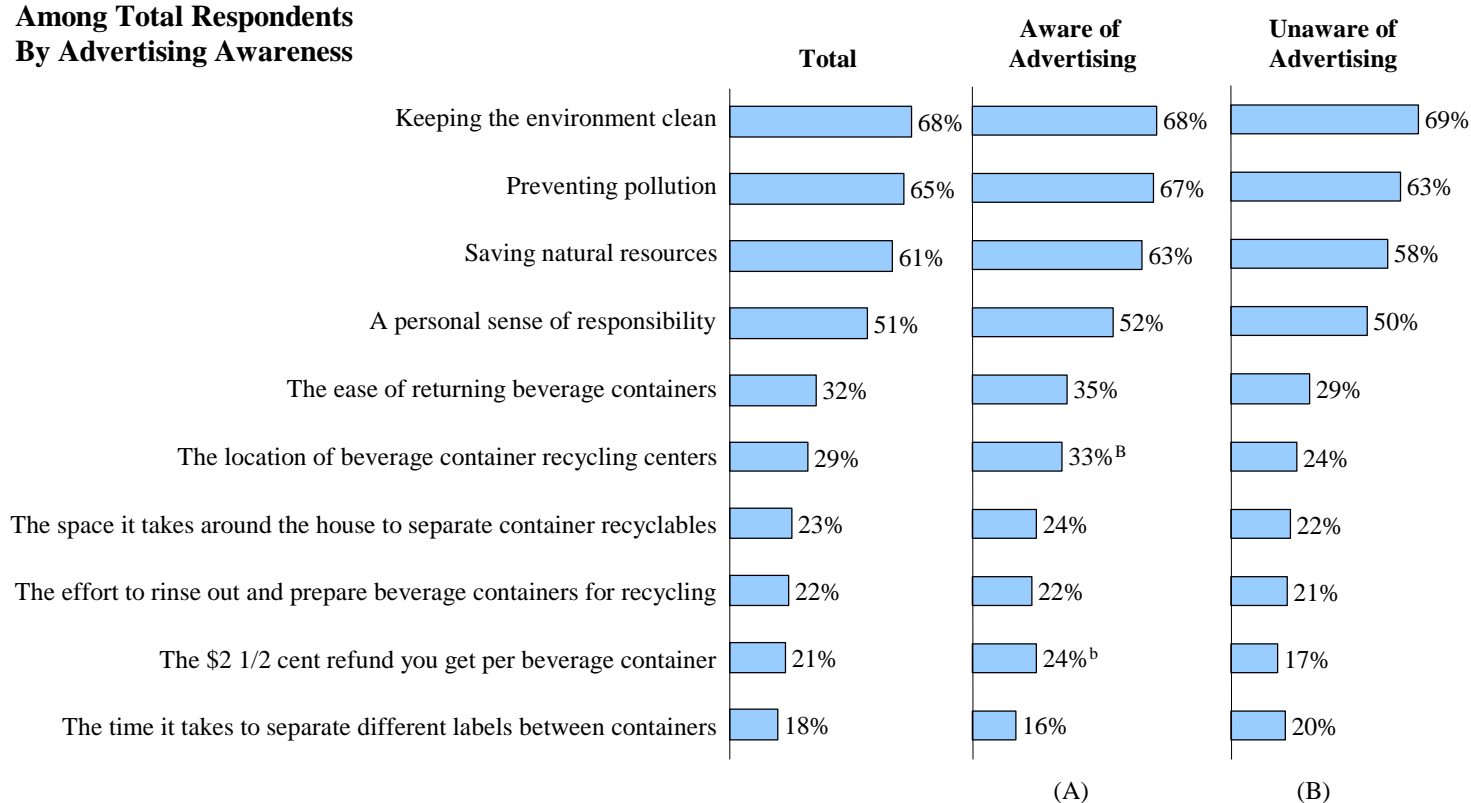
Influential Elements When Deciding To Recycle Beverage Containers

INFLUENTIAL ELEMENTS

Percent Rating A 9 Or 10 On A 10-Point Scale

Among Total Respondents

By Advertising Awareness



Question 4b: How much influence does (INSERT STATEMENT) have on your decision whether or not to recycle beverage containers?

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